

EDUCATION AND THE ELDERLY:
A STUDY OF WHY THE ELDERLY
PARTICIPATE IN EDUCATIONAL PROGRAMS

A Thesis submitted in partial fulfillment
of the requirements of the Master's of
Social Work Degree.

by

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September, 1978

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the University of Manitoba in partial fulfillment of the requirements
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MASTER OF SOCIAL WORK

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ABSTRACT

This study examines the reasons for the elderly's participation in educational programs from two approaches to aging, an activity approach and a continuity approach.

A sample population was drawn from elderly participants in "segregated" educational programs, and an intensive focused interview was used.

Analysis of the data identified three types of elderly participants in educational programs, Busy-keepers, Opportunists and Continuers. These types were identified from three primary reasons for participation: to maintain some form of activity, to pursue an education they have always wanted, and to continue participation in programs.

The three types identified were found to be illustrative of varying degrees of activity and continuity, and of a thrust towards self-development. Out of this, a number of suggestions for programming and further research have been made.

ACKNOWLEDGEMENTS

I would like to thank all of those who supported me in this study through consultation, advice, information, typing, and the opportunity for an interview.

To the members of my committee,

Professor Patricia Woolley, Chairperson
Dr. Joseph C. Ryant
Professor Ernest Shapiro

To staff of the Age & Opportunity Centre Inc.,

Mrs. Yhetta Gold,
Miss Dorothy Hardy
Mr. Myroslaw Tracz

To Dr. Brian Bendor-Samuel, University of Winnipeg

To the Henjum Senior Citizens' Toastmasters Club
and the Sunshiners'

To the Senior Citizens' Creative Writing groups

To Miss Margaret Wheeler, Mrs. Jean Simpson
and Mrs. Gayle Ferguson

To all 50 respondents who participated in this study,
and to those who helped by giving of their time
and selves for pre-testing.

And to David and Alison

Thanks

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CHAPTER I

INTRODUCTION

In Canada, educational programming for the elderly¹ might be considered a phenomenon of the 1970's. Now that research findings have dispelled many of the culturally assigned incompetencies that used to be associated with the learning abilities of the elderly, (among others, Eisdorfer 1967, Sherwood 1967, Talland 1967, Atchley 1972, and Kimmel 1972), there is a thrust to include educational programs within the spectrum of social services for senior citizens.

This added dimension in services has been encouraged by awareness of a growing elderly population in Canada. This growth is projected until 1986, after which date a slight decline is expected based on a below-average growth in the forty-five to sixty-four age group during the 1971-1986 period. This steady growth in the elderly segment of the Canadian population is shown in the statistical figures compiled by Yudelman (1974). In 1961, the elderly population was

¹Throughout this study, the terms "elderly", "older adult", "older individual", "the old", "the aged", and "senior citizen" are used coterminously to refer to individuals sixty years of age and over.

estimated at 1,086,400, or 7.7 per cent of the population. In 1971 this population was 1,744,410, or 8.1 per cent of the population, and in 1973 1,834,200, or 8.3 per cent of the population. The projected figure for 1986 is 2,600,000, or 9.8 per cent of the population. The projected 1986 figures represent a 47 per cent increase in the elderly population since 1971. (p. 9)

A longer life expectancy has been a significant factor in this population trend. In 1931 the average life expectancy for the Canadian male was sixty years, and for the Canadian female sixty-two years. In 1951 this had risen to sixty-six years for the male, and seventy for the female, and in 1971 to sixty-nine years for the male and seventy-seven for the female. (p. 9) At the same time it is important to note that only a small proportion of the elderly in Canada (5 per cent) require nursing home care. (Age Opportunity Centre Inc., Winnipeg).

Social work has a responsibility to contribute to the understanding of this period of the life-cycle, and to enable and ensure that activities provided for older citizens have the potential for enhancing their lives. In the field of education for senior citizens, the social worker has a valuable contribution to make as advocate, facilitator, and/or collaborator. To this end, a sound understanding and knowledge base are essential.

Prior to the 1970's, educational opportunities for

the elderly appear to have been limited. A special committee on learning opportunities for the elderly, appointed by the National Committee on Aging on June 19, 1964 to explore learning opportunities for the elderly in Canada, reported two years later that apart from programs being offered through senior citizens' centres, church groups and informal clubs, there existed practically no educational programs for this age group. A country-wide survey of university extension departments and provincial departments of education, which resulted in a response rate of seventy per cent from universities, and eighty per cent from provincial departments, showed that with two exceptions, there were no programs designed specifically for the elderly. In addition, most of the educational institutions reported that they were unable to estimate the proportion of senior citizens attending existing programs because age was seldom requested on registration forms. (The Canadian Welfare Council, 1970).

Today, educational programs designed specifically for the elderly are offered through several Canadian universities and colleges, such as the University of British Columbia, Simon Fraser University, Douglas College, the University of Victoria, Humber College, the University of Prince Edward Island, the University of Alberta, Universite de Sherbrooke, and the University of Winnipeg.

Educational programs for the elderly may be classified into two general categories through the locally used

terms of age-integrated programs and age-segregated programs. Age-integrated programs refer to regular adult educational programs in which the elderly are allowed to participate, contingent upon their ability to meet the eligibility requirements of the particular institution. Age-segregated programs refer to programs which are available exclusively to senior citizens through educational institutions or other bodies such as churches or groups of senior citizens.

In the City of Winnipeg, age-integrated programs are available through the University of Manitoba and its Continuing Education Division, the University of Manitoba Women's Club, the University of Winnipeg, the Free University, Red River Community College, the Evening Division of the Winnipeg School Division Number One, the Y.W.C.A., the Y.M.C.A., the Y.M.H.A., and other adult education institutions. Age-segregated programs are available through senior citizens' centres, the Institute for Continuous Learning of the Age and Opportunity Centre Inc., the University of Winnipeg, and through groups of senior citizens themselves.

Social workers and adult educators are in the forefront of professional groups directly involved in the provision of educational programs for the elderly. In extending provision of programs to the elderly, adult educators express the view of education as a continuing process.

In their collaborative efforts with adult educators, social workers have been working from a broad philosophy of

opportunities for self-enhancement in the retirement years. This view was expressed by the Age and Opportunity Centre Inc., in Winnipeg in a brief dated June 18, 1973, and re-affirmed in a report of the Senior Citizens' Open Forum Series,² June 16, 1975.

In his definition of the task of adult education, Bergevin (1967, p. 14) addresses two central tenets of adult education, those of teaching adults "how to live a full and productive life in which the ability to make a living and stay well is important, but equally important is the knowledge of what to do culturally and spiritually with our lives." (1967, p. 14)

Leckie (1974, Appendix A, pp. 1-2) points out that the meaning of "adult education" depends on the background of the person using the term. He presents the following meanings of adult education:-

(a) The whole field of adult educational endeavour lying beyond the formal degree-and-certificate granting system of schools, colleges and universities.

(b) A sub-field of a broader term ("continuing education" or "permanent education") denoting organized programs in liberal arts, citizenship, recreation and handicrafts, but excluding vocationally oriented programs of up-grading and re-training.

²A series of weekly lectures/discussions on topics of interest to senior citizens, held throughout the winter months from October to April in a central location.

(c) An historical term, rapidly becoming obsolete, describing educational activities after the completion of formal schooling, in the 1850-1950 period. Leckie's second definition describes the general thrust of education for the elderly.

Involvement at committee levels and adult education workshops³ indicate that planners and programmers use two approaches to this general practice of adult education, an "activity" approach and a "needs" approach. The "activity" approach seems to be reflected in the presentation of programs "as a worthwhile activity for the retirement years." The "needs" approach is apparent in discussions of programs as "a way of meeting the needs of the elderly." Needs usually discussed are those of socialization and belonging, achievement and self-esteem, mental stimulation, leisure-time pursuit and self-fulfillment.

In the absence of research in this area of practice, the question arises as to whether or not these approaches are the most effective for planning and programming. A third approach, that of continuity, which has been suggested in some of the more recent literature on aging, may provide further useful insights for educational planners. A theoretical

³As a staff member of the Age and Opportunity Centre Inc. between June 1973 to August 1975, the writer assisted in the development of, and worked with the Institute for Continuous Learning Inc. In this capacity she was involved in a number of planning meetings and workshops.

discussion of these three approaches to aging is presented in Chapter II.

Realizing that planning and programming for senior citizens would be enhanced by greater clarity regarding what older individuals hope to achieve through their participation, this study was initiated to attempt to answer the question, Why do the elderly participate in educational programs - what are their reasons?

CHAPTER II

THEORETICAL FRAMEWORK

Theories of aging attempt to explain motivational behaviour in the old age period. In Chapter I, three approaches to planning and programming for the elderly were mentioned, an activity approach, a needs approach, and a continuity approach. These approaches are discussed within this chapter.

The Needs Approach

The concept of needs appears frequently in the literature on aging, and is generally employed in discussions centering around factors of reduced capacities in old age and role loss. The needs of the elderly that are commonly discussed are health care, proper housing, economic security, physical and mental stimulation, leisure-time activities, companionship, self-esteem, purpose in life, and self-actualization. (Among others, Hoffman, 1970, Field, 1972, Puner 1974, Huyck, 1974.)

The concern with the identification of needs in the old age period is lodged in humanitarian principles to provide opportunities for a meaningful old age. Puner (1974) confirms this when he says,

There are many needs and drives that must be accounted for if older people are to achieve the good long life in retirement. (p. 174)

Huyck (1974) writes in a similar vein. She says,

There are basic human needs of older people that need to be met, regardless of culture. These include the desire to maintain some involvement in the society; to serve some worthy purpose and to be valued; to preserve dignity and possessions; and to meet death honorably. (p. 21)

This approach to needs, as used in the literature on aging, is a common-sense one, embracing a number of concepts at various levels of abstraction. Despite its wide use in the literature on aging, no conceptual definition of need is offered.

A review of the psychological literature on needs shows an historical development from a purely biological and psychological orientation to psycho-social conceptualizations. Prior to the 1920's and 1930's, psychoanalytic, psychiatric and psychological theorists of motivation and personality tended to emphasize man's biological characteristics, and largely ignored influences of the social environment. Early conceptualizations of need dealt primarily with the basic needs of hunger, thirst, sleep and sex, and focused on instinctual behaviour and drive theory.

Cofer and Appleby (1964) view Freudian theory as a starting point in the introduction of social concepts into need theory. They point out that in his final Outline of

Psychoanalysis, Freud (1938, p. 19) wrote that the true purpose of the individual organism's life is the satisfaction of its innate needs. These needs give rise to tensions, the forces behind which (the instincts)... represent the somatic on the mental life." These are the ultimate cause of all activity. Yet in a sense, in developing the concepts of the ego and superego, they feel that Freud had begun to give recognition to the influence of social factors in the direction and content of the activity. In Freudian theory the ego takes account of the requirements of external reality, and thus is governed by the reality principle. The superego forms part of the ego, but remains functionally separate. Through contact with the outside world, certain consistent patterns are experienced and internalized. These patterns reflect the values of the culture. (Freud, 1940)

Emphasis on the role of culture, however, began with such theorists as Horney (1937, 1939, 1945, 1950), Fromm (1955), and Sullivan (1947).

Horney employed the concept of neurotic needs, which may become institutionalized as modes against anxiety. Some of these needs are for affection and approval, for prestige, and for power. Horney centered the causes of neurosis in the cultural pressures of early childhood.

Fromm emphasized the fundamental loneliness of man, which stems from his success in freeing himself from

immediate dependence on nature. In his loneliness, man seeks to escape from freedom. The central problem of human motivation thus becomes the solution of the problems man has created. Fromm considers self-integrity to be the primary motivation of man, that is, to discover his true self, to use the society he has created, to relate himself to his fellow man on the basis of love and brotherhood, to transcend nature by creating rather than destroying. The nature of man's condition has created needs for identity, rootedness, transcendence, relatedness, and orientation.

Sullivan saw personality as emerging out of interactions with others in the society and as a product of social forces that act upon the individual. He proposed that the self is a developmental product of early experiences with rewards and punishments, not an inborn potential. It is made up of "reflected appraisals" of others, and in turn monitors what will be attended to and what will be neglected or distorted. With sufficient new experience, self-dynamism can be changed.

Cultural anthropology and sociology have contributed to the understanding of man in a socio-cultural context. Examples of the variations in behaviour which occur as a result of learning and experience are to be found in this literature. Cofer and Appleby (1964, pp. 568-574) cite examples from Klineberg (1940), Du Bois (1944), and Kardiner (1945). They point out, for example, that acquisitiveness

is important in Western society, but there are other societies in which property is communal, according to custom. The Zuni, the Hopi and the Arepesh are non-competitive peoples. Among the Alorese shrewdness and discovery have the status that competence and ability have in other societies, whereas honesty, skill and heroism are not highly valued or admired. The Alorese have little interest in graphic arts, though music is of some interest. In Plainsville, a small midwestern town in the United States, education, knowledge and skill tend to be admired. Security and status are values to be achieved through success and perhaps wealth. Power over others is not an evident value.

Learning theorists emphasize learning through experience. These theorists believe that unlearned biological drives are insufficient to account for all motivational phenomena. Tolman (1959, in Parsons & Shils, eds.) classifies needs into three types: primary needs, secondary needs, and tertiary needs. Primary needs include hunger, thirst, sex, pain avoidance, aggression against outside obstacles, and a general exploratory curiosity. Secondary or "socio-relational" needs, which he views as largely innate, include affiliation, dominance, dependence, and submission. Tertiary needs are learned needs, such as wealth and business success. In Tolman's conceptualization, tertiary needs are assumed to be subgoals connected by beliefs to more basic goals.

Two concepts which Tolman presents in an action model are a belief-value matrix, and behaviour space. The belief-value matrix may be culturally shared or unique to an individual. It consists of beliefs that doing things or getting to objects, situations, or goals, will gain satisfactions. These objects, situations or goals represent categories. Thus one may believe that classes of objects or situations have the capacity to satisfy a need.

Behaviour space consists of the environment and its objects as the actor perceives them. The objects have positive or negative valences, corresponding to particularization of values from the controlling and activating belief-matrix system. Part of this behaviour space includes the "behaving self", which includes need-pushes, corresponding to need deprivations. This concept emphasizes that the behaving person responds to his environment as he perceives it at any given time.

In their interaction, the need system and the belief-value matrix seem to produce the behaviour space and essentially to constitute what Tolman means by personality.

The concept of self-actualization as need was developed by such writers as Allport (1937, 1955, 1960, 1961), Rogers (1961, 1968, 1969), and Maslow (1954). Self-actualization stresses the uniqueness of the individual, and emphasizes a holistic or organismic and phenomenological

approach to human experience and conduct. The essential meaning of the concept of self-actualization is found in the discovery of the real self and its expression and development.

As can be seen, the discussion on needs eventuates in a number of needs at varying levels of abstractions. Maslow (1954) has synthesized these needs into an hierarchical framework in which he places basic needs at the base of the hierarchy, followed by "socio-relational" needs, with self-actualization at the top. To explain this hierarchical framework, he falls back on drive theory, and develops a need reduction model within an hierarchical framework. In this model, the satisfaction of lower level needs becomes a requirement to seeking out the satisfaction of socio-relational needs, and ultimately, the need for self-actualization. This model is not without its problems as a framework for research in motivational behaviour. Moving from the assumption of needs, it provides as an explanation a physical or emotive state which gives rise to the activity, but does not provide a frame of reference for the pattern or direction of the activity.

The Activity Approach

The activity approach to aging appears to have developed as an expression of general public concepts of disengagement as a state of being in old age. The practice of activity in old age through such vehicles as church programs,

senior citizens' centres, and trips and tours has been encouraged largely as a preventive measure to help the elderly maintain a healthy old age and avoid early institutionalization. At a theoretical level, an activity approach to aging seems to have grown out of formal conceptualization of a disengagement theory, which was first described by Cumming, Dean, Newell and McCaffrey in 1960, and later elaborated upon by Cumming and Henry in 1961. The Cumming and Henry theory has evoked a number of responses (Spence, 1975, Cath, 1975, Gordon, 1975) and has led to further clarification by Cumming (1975).

In its present stage, the activity approach proposes that the older person who ages optimally is the person who stays active and who manages to resist the shrinkage of his social world. He maintains the activities of middle-age as long as possible, and then finds substitutes for work when he is forced to retire; for friends and loved ones whom he loses through death. (Neugarten, 1968, in Neugarten ed., p. 161)

As presented by its earliest writers, the disengagement theory postulates that as people grow older, their behaviour changes, the activities that characterize them in middle age become curtailed, and the extent of their social interaction decreases. Its propositions are that the individual's withdrawal has intrinsic or developmental qualities as well as responsive ones; that social withdrawal

is accomplished by, or preceded by, increased preoccupation with self and decreased emotional investment in persons and objects in the environment, and that disengagement, in this sense, is a natural process. (Ibid., p. 161)

The disengagement theory views the gradual mutual withdrawal of the individual and society in later life as a predictable process. In the 1961 publication, Growing Old, Cumming and Henry state,

Aging is an inevitable mutual withdrawal or disengagement. (p. 14)

In a later statement, Cumming (1975, in Kastenbaum, ed.) elaborates on this,

If the individual has relinquished obligatory roles, and if he has become more individuated and expressive, which is to say less normative and conforming, then he is unlikely either to seek out or to be sought out for new obligatory roles. This is the same as saying that once started, disengagement has a momentum of its own. The implicit trade-off for the aging individual is that in giving up obligatory roles he gains freedom as he loses centrality. (p. 188).

In the disengagement theory, successful aging is manifested in the individual who reaches a new equilibrium characterized by greater psychological distance from the social system and by decreased social interaction.

In accepting the premise of decreased interaction, the activity approach contends that disengagement is socially undesirable. To slow down the process of disengagement, it turns to the social structure for an answer. Role loss is

emphasized; substitute activity through role replacement thus becomes a central concept.

The activity philosophy does not actively seek to avoid relating the substitute activity to the individual's past life. However, the emphasis remains on activity per se, rather than on activities that are congruent with past interests and experiences. Viewed from the activity philosophy, the elderly participate in educational programs out of a belief that it is socially desirable to keep busy in old age, or that disengagement in old age is undesirable.

The Continuity Approach

The continuity approach to aging revokes the concept of old age as generally symptomatic of withdrawal and disengagement, and implies that the important variable in studying the elderly is not the level of activity but the continuation of lifestyles and life patterns. The premise of the continuity approach is that the individual's reaction to aging may be explained by examining the complex interrelationships among biological and psychological changes, the person's habits, preferences and associations, situational opportunities for continuity, and actual experience. (Atchley, 1972, p. 26)

Thus in looking at the reasons for the elderly's participation in educational programs, interests, values, and past activities assume significance.

The terms, "interests" and "values" are used

discretely rather than interchangeably. Based upon Parsons and Shils (1959) discussion of theories of action, an interest is defined as the liking or preference for a particular thing. Interests generally grow out of experience and positive feelings. Interests may change over time according to physical abilities and energy, and cultural expectations. Vocation and other life experiences through roles are more likely to influence an individual's interests than chronological age.

A value is defined as a belief or a code of thinking which prescribes that which is morally good or bad. An individual may simply hold a value, or the value may move him to action. Values are generally inculcated through cultural norms and expectations. When an individual internalizes a belief either on his own or as a member of a group, and invests it with emotion, he may be said to hold a value.

The use of the term "activity" or "activities" within the continuity philosophy is employed in the everyday manner, and means a sphere of action, such as swimming, or reading. It is to be differentiated from the activity philosophy, which conveys the meaning of keeping busy or active to prevent disengagement.

The view that the individual behaves in a thematic pattern congruent with his personality has been put forward by several writers. Lidz (1968) for example, writes,

Out of the multiplicity of factors that enter into the shaping of a life, resultant patterns of living and relating emerge. A theme, or a group of interrelated themes, appears that can be modified and adapted to the stages, specific tasks, or to the exigencies that arise. (p. 510)

Reporting on the results of a study, Simpson (1973, in Boyd & Oakes, eds.) points to the trend towards the maintenance of life patterns in later life.

Their interests, activities, associations, and relationships were formed during earlier years of life. The setting in which these patterns are activated may change, but not the patterns themselves. We found that out of 306 retired workers, only 11 evolved any new interests or associations in retirement, and personal involvement in the new ones was much less than in long-established patterns. We are not saying that an individual's life is unchanged by his withdrawal from the labor force. The loss of work, whether experienced with favorable anticipation or dread, involves the loss of a significant status and a daily routine, coupled with the necessity of evolving new ones. Resources upon which the retiree may draw in adapting to this new uncertain situation of leisure are the patterns of behavior which characterized his life while working. (p. 167, emphasis added).

Based on the findings of the Kansas City Study of Adult Life,² Neugarten, Havighurst and Tobin (1968, in Neugarten, ed.) concluded that the aging individual may or may not disengage from the pattern of role activities that

²The Kansas City Study of Adult Life was a number of studies of individuals between the ages of fifty and fifty-five, carried on over a period of time under the direction of the Committee on Human Development of the University of Chicago. Cumming and Henry also used a Kansas City sample population.

Source: Cumming & Henry, 1961; and Neugarten, 1968.

characterized him in middle-age, but that it was highly doubtful that he ever disengaged from the values of the society which he had long internalized, and that it was even more doubtful that he ever disengaged from the personality pattern that had long been the self. They propose that the aging individual continues to exercise choice and to select from the environment in accordance with his own established needs, so that he ages according to a pattern which has a long history and which maintains itself, with adaptation, to the end of life. These authors propose that the theme of decreased interaction between the individual and society and others in society in the disengagement theory is more properly explained by role loss. In their words,

There is considerable evidence that in, normal men and women, there is no sharp discontinuity of personality with age, but instead an increasing consistency. Those characteristics that have been central to the personality seem to become even more clearly delineated, and those values the individual has been cherishing become even more salient. In the personality that remains integrated - and in an environment that permits - patterns of overt behavior are likely to become increasingly consonant with the individual's underlying personality needs and his desires.

The results of a forty-year longitudinal study by Maas and Kuypers (1974, p. 200) emanating from the Berkeley

Study³ dispel popular beliefs that there is a massive decline in psychological functioning or a narrowing down of ways of living in old age. They found most of their 142 subjects to be psychologically well-functioning and healthy persons.

Summary

As can be seen from the above discussion, there is no single approach to need. Over the years, "need" has evolved from a purely biological conception to include psychological and sociological dimensions. In this study, "needs" are viewed from a psycho-social perspective. Learning and experience in the socio-cultural context thus assume significance in the importance assigned to various needs, and the way in which individuals attempt to meet them.

From this perspective, needs may be subsumed within the continuity approach to aging, and not as a separate

³The Berkeley Growth Study was begun in 1928 by Nancy Bayley to study physical, mental and motor development, as well as parent-infant relationships. The Guidance Study was begun in 1928 by Jean Walker Macfarlane primarily to study personality development. The results were filed at the Institute of Human Development at the University of California Berkeley campus. Follow-up studies were conducted in 1958. In the late 1960's, when a further follow-up study of forty-year olds (the children) was being planned, Maas & Kuypers saw the feasibility of including parents to explore personality and life sequences between early adulthood and old age.

Source: Maas & Kuypers, 1974, pp. 1-5.

entity. In its orientation to aging, the continuity approach stresses the significance of learning and experience of the earlier years on the later personality pattern, and attempts to provide a holistic model by including the psychological factors of aging, as well as opportunities for continuity within the society.

The activity approach stresses conformity through a social expectation to maintain an active state of being. Essentially, disengagement theory assumes a psychological drive to withdraw. The withdrawal is seen to be assisted through decreased interaction as a result of role losses. Therefore, to prevent disengagement, the activity approach emphasizes participation in the social structure, and encourages older individuals to find substitute activities. In this sense, activity in old age becomes a societal value.

This study proceeds on the basis of two approaches to aging, "activity" and "continuity", and examines reasons for the elderly's participation in educational programs from these two perspectives. "Needs" are subsumed within the continuity approach.

CHAPTER III

METHODOLOGY

As stated in Chapter I, this study is directed towards the discovery of the reasons for the elderly's participation in educational programs. It seemed logical that these reasons should be examined from the perspective of elderly participants themselves, rather than from the perspective of planners and programmers, as the elderly participants would be better able to describe their motivations.

This chapter describes how the study population was selected, and the methodology used for data collection and analysis.

The Population

Participants in age-segregated programs were selected as the study population. This decision was based on the easy availability of lists of participants in these programs. Information from a number of educational institutions confirmed that elderly participants in age-integrated programs are less easily identifiable, and that producing a list of such participants would be a lengthy and time-consuming task.

Participants in educational programs offered through senior citizens' centres were not included in the population. There are over ten such centres in the city. While educational

programs offered through the Centres are primarily for Centres' clientele, many other senior citizens use their programs. In order to keep the study within manageable limits, and because it was felt that the users of educational programs within the Centres would be adequately represented in the overall sample, it was decided not to include them.

Participants in the Senior Citizens' Open Forum series were included in the study population through other programs. The Open Forum series was the forerunner to educational programs for the elderly. A cross-check of the lists showed that all the participants in the Open Forum series were participants in programs through one or more of the other institutions.

The Sample

A random stratified sample of 50 respondents, 20 males and 30 females, was drawn from four age-segregated program groupings. These were:-

1. The University of Winnipeg senior citizens' programs,
2. Programs offered through the Institute for Continuous Learning of the Age and Opportunity Centre Inc.,
3. The senior citizens' Toastmasters programs, funded by New Horizons and operated by a Board of senior citizens, and
4. The senior citizens' Creative Writing Workshops funded by New Horizons and operated by a Board of senior citizens.

The sample was stratified by program grouping and sex as a measure of assuring adequate representation within the study population. Lists of individuals (Fall-Winter session, 1976) had shown a disproportionate number of females in two program groupings over the other two, and a disproportionate number of females over males in all organizations.

The total study population was 390. There were 330 females, and 60 males. A breakdown by program grouping and sex is shown in Table 1.

Table 1

Total Study Population by Program Grouping and Sex

Program Grouping	Male	Female	Total
University of Winnipeg	25	125	150
Institute for Continuous Learning	16	143	159
Toastmasters' groups	9	29	38
Creative Writing Workshops	10	33	43
Total	60	330	390

The disproportionate numbers in the sampling frames led to a decision to select a larger number of respondents from the two larger sampling frames. Five respondents were selected from each of the six small sampling frames, and ten from each of the two large sampling frames. Table 2 shows the sample selection by sampling frames in numbers and percentages.

Table 2

Sample Population by Numbers
and Percentages

	U. of W.		Institute		Toastmasters		Creative Writing	
	Nos.	%	Nos.	%	Nos.	%	Nos.	%
MALES	5	20	5	31	5	44	5	50
FEMALES	10	8	10	7	5	24	5	9

Overall, this represented 13 per cent of the total study population, with one-third of the males and approximately ten per cent of the females.

The Research Instrument

An interview guide, based upon the methodology of the focused interview (Merton, 1956) was used for data-gathering. This instrument was selected for this exploratory study because of its usefulness in examining subjective behaviour.

The interview guide was designed to elicit information on the educational interests and values of the respondents, and to discover at what stage/s of the life cycle, and influenced by what factors, these interests and values developed. Reasons for participation in the old age period were explored. Respondents who had previously participated in adult educational programs were also asked what their reasons were at that time. One section of the interview guide was devoted to middle-age roles in order to get at a description of the activity pattern of the middle years.

A combination of closed and open-ended questions were used throughout the interview guide. Closed questions were used to obtain factual information, such as programs which respondents were taking or had taken. Open-ended questions were used to explore the interests and values of the respondents with regard to participation in programs, such as when and how the interest in a particular program started. As well, probing and follow-up of cues were built into the interview guide.

For more detail on the guide, please refer to Appendix I.

Data Collection

A pre-test was conducted with four respondents, one male and three females. All four program groupings were represented in the pre-test. The purpose of the pre-test was to test the sensitivity and adequacy of the interview guide.

Subsequently, and prior to the interview, letters were mailed to the selected sample explaining the purpose of the study and inviting their participation.¹ This was followed up with a telephone call to verify participation and to arrange a suitable time for the interview. Respondents who declined to participate were replaced. This had been planned for by the selection of three extra names from each sampling frame.

¹A copy of this letter is attached as Appendix II.

Interviews were conducted in the respondent's home, except where the respondent indicated a preference to be interviewed elsewhere. Three respondents did request to be interviewed in a senior citizens' centre, one at the Institute, and one at the University of Winnipeg.

All the interviews were taped and transcribed verbatim.

Analysis of the Data

Step 1

The interviews were surveyed on an overall basis to determine commonalities for sorting. This initial survey showed:-

1. Many of the respondents (72%) had participated in adult education programs at some stage prior to the old age period. Only a small number of the respondents (28%) were participating in adult education programs for the first time.

2. Most of the respondents (66%) were engaged in subject areas which were both familiar and new to them. However, a few respondents (16%) did select only those subject areas which were familiar to them. A few others (18%) chose subject areas which were completely new to them.

3. A majority of the respondents (76%) were engaged in more than one course, either at the same educational institution, or through other educational institutions.

4. Most of the respondents (82%) expressed interest in participating in other courses, some of which were available in the community.

Step 2

This initial survey of the interviews revealed that respondents fell into three groups: those who were participating in subject or skill areas for the first time in the old age period, those who were participating in subject or skill areas in which they had engaged at some time/s prior to the old age period, and those who were participating in a combination of old and new subject and skill areas.

Respondents also fell into two further sub-groups: those who had participated in adult educational programs prior to the old age period (former role), and those who were participating in adult educational programs for the first time in this period (new role).

It was decided that "subject areas" and "roles" provided a useful basis for sorting. Accordingly, the interviews were sorted into six groups by subject areas and roles. These six groups were:-

new subject - new role (NN)

new subject - former role (NF)

old subject - new role (ON)

old subject - former role (OF)

old & new subject - new role (ONN)

old & new subject - former role (ONF)

It was thought that this sorting would point out commonalities within the groups. For example, the NN group was suggestive of little or no continuity, whereas the OF group

seemed indicative of high trends towards continuity. The other groups seemed to fall somewhere in-between these two groups.

However, this sorting pointed out a number of dissimilarities within the groups, a number of similarities among the groups, and distinct indicators of participation.

These were:-

- participating in programs to keep busy,
- wanting to keep busy out of a social expectation,
- wanting to keep busy to prevent physical and/or mental decline,
- the belief that keeping busy is a preferable state of being in old age,
- a valuing of education in and of itself,
- an interest in a particular subject area,
- using the old age period to do something one has always wanted to do but was previously unable to do,
- continuing pursuit of interests in old age,
- continuing participation in education programs in old age.

These indicators were coded on cards, with the numbers of the interviews in which they occurred.

From this, it became evident that the respondents were participating in programs out of three major motivations.

These were:-

1. Primarily to keep busy. This motivation to keep

busy was sometimes qualified by wanting to keep busy out of a social expectation to do so, or to prevent physical and/or mental decline.

2. To pursue the education which one had wanted prior to the old age period but had been unable to do.

3. To continue one's educational interests through continuing participation in educational programs.

Step 3

The results of step 2 led to a re-sorting and re-classification of the interviews into three groups according to the primary motivation of the respondents. Each group of interviews was double-checked against the coding to assure discreteness of categories. Because the categories refer to general themes which were not always entirely discrete, some interviews were difficult to classify. Where this occurred, a judgement was made, based on the general orientation of the individual as revealed in the interview.

The three groupings into which the interviews were classified were:-

1. Busy-keepers - respondents who participate in educational programs primarily to keep busy. Busy-keepers subscribe to a philosophy that one should occupy oneself in old age, and view the program chiefly as a substitute for former roles and activities.

2. Opportunists - respondents who describe their participation in educational programs as an opportunity which

becomes available to them in later life. Opportunists express a value for education, and view their participation as a step towards growth and development, and towards greater challenges.

3. Continuers - respondents who have participated in educational programs most of their adult lives, and continue to do so in old age. Respondents who begin to participate in educational programs a few years prior to retirement, in preparation for retirement, are not regarded as Continuers, and are classified according to their primary motivation at that time.

The following is a numerical breakdown by sex, of the elderly in the three descriptive categories.

	<u>Male</u>	<u>Female</u>	<u>Total</u>
1. Busy-keepers	8	13	21
2. Opportunists	6	9	15
3. Continuers	6	8	14

Summary

Respondents in educational programs described three primary motivations for participation in programs. These were to keep busy; to pursue, out of a value for education, an opportunity they had always wanted; and to continue an adult life pattern of participation in programs. From these primary motivations, respondents were classified into three groups, namely, Busy-keepers, Opportunists, and Continuers.

These groups were identified in terms of their primary motivation, and not by the activity or continuity approaches to aging. Therefore, within each group, tendencies towards disengagement or continuity may appear. For example, while the primary motivation of Busy-keepers is to keep busy, in the selection of subject areas some Busy-keepers tend to fall back on familiar subject areas. While the primary motivation among Continuers is to continue a life pattern, some of them are highly aware of the social implications of aging. Opportunists are primarily motivated out of a value for education. However, they do not participate in programs until they achieve added leisure in the old age period.

These groups are discussed more fully in Chapter IV, where analysis of the data is presented.

CHAPTER IV

PRESENTATION OF THE DATA

Analysis of the data has pointed to three primary motivations for the elderly's participation in educational programs and to the identification of three types of participants. Busy-keepers comprise 42 per cent of the sample, and are people whose primary motivation is to keep busy through substitute activity; Opportunists comprise 30 per cent, and are pursuing the education they have always wanted; Continuers comprise 28 per cent, and are people who are continuing a middle-age role. The rest of this chapter is devoted to a description of the types identified.

Busy-keepers

Busy-keepers participate in education programs in the old age period as a substitute for social losses. They subscribe to a philosophy that one should occupy oneself in old age, viewing activity as desirable in this stage of the life cycle. They see the activity as an antidote to boredom, and as a preventive measure against mental and physical deterioration. This is either implied or explicitly stated. For example, of his participation in a History of Art class, one man simply says, "I was looking for something to do."

Others in the group, however, describe the importance of keeping busy more fully in statements such as,

It was only since I retired I thought I would find something to do. I was busy before with my work and I felt I had to keep busy, or I'd go nuts.

I was really looking for something that I can do. I am not one that can sit around all day and watch T.V., or not doing anything.

I thought I wasn't filling time. After you've been working for twenty years, you need something to fill that void.

You can't just sit and mope around. The family are all gone. I mean, that's no way. You have to keep alive or you're just going to be down feeling sorry for yourself.

The fear of mental and physical deterioration that is characteristic of Busy-keepers is expressed in statements such as these,

I never wanted to be a burden to my family. That I should come and be just sitting down, and they would come and visit me, and all I can do is maybe go with a cane, and they would come and take me from one place to another. So I guess in back of my mind, that was quite a while ago, that I thought you could keep your mind really occupied.

It keeps your mind active. When you're older, you're apt to just sit around looking at the four walls. Well, that would be the day when I would do that. I like to mix with people of all ages, because I think you get a lot out of younger people, although I like my own age too. I think it keeps you young, and your mind active and healthy. I'm all by myself. I've just the one son, and he doesn't live here, and I could feel sorry for myself but I don't.

I wanted the stimulant, to keep my mind alive. As I say, if you don't use your mind, you will lose it.

Some of the women describe a responsibility, perhaps an expectation, to keep busy. This might be a reflection of a societal attitude. This is expressed in statements such as,

I feel when you retire you have to spend your time in some way. I go to the Blood Donors on Monday nights, which I have done for twenty-five years, and I go to Meals-on-Wheels on Wednesday, so I thought this (Religion) would be a nice choice.

I took one on Art last year, and I took one another place the year before. It was just if I heard of something. I know that a number of elderly ladies, when their children are grown, they often go to these classes, the University of Manitoba Women's group, and I wondered if I would enjoy going into it.

"Busyness" has been part of a lifestyle for many Busy-keepers, and they would like to maintain an active state of being. For example, a retired teacher, who is now

widowed and whose children have grown up and moved away, says,

I have always been a busy person, and I feel that I must continue to be a busy person, so I take this Writing and I take swimming this year. I wanted to continue to keep busy. That has always been part of my life.

Another woman expressed a similar philosophy,

We were brought up that we just didn't sit around. We didn't have to then. We were living on the farm and we did things all the time. I suppose that we just learned that we shouldn't sit around with idly hands. It was part of our lifestyle. We just had to have something to do.

For the most part, the selection of educational programs as a substitute activity is purposeful. In looking for substitute activities, Busy-keepers tend to seek out programs which they think they will enjoy, or which they perceive as useful in the old age period. Some of these programs apparently lie within the educational field through particular course offerings. Courses which fall into the enjoyable category are generally associated with past interests or old activities, positive experiences, and happy memories, such as reading, working with one's hands, a love of music. Participation in these courses is mainly for intrinsic value.

Courses which help to maintain a current perspective on everyday life, or which contribute to good physical health, are seen as useful in the old age period. Busy-keepers who

select useful courses base their selection on their understanding of the problems of the old age period. They associate the problems of aging with social forces, such as role loss which removes one from involvement with life, and/or with biological aging, which can bring about mental and physical decline. Therefore, they tend to select current events courses or physical fitness courses. Participants in these courses have not participated in formal courses of this kind prior to the old age period. For example, a newcomer to Canada takes a course in Government to become knowledgeable of life in his new country. He claims that in order to know what is going on around, one has to be aware of how politics work. A woman participates in Yoga. She views this program as a means of maintaining good health, both physically and mentally.

Value judgements of what constitutes meaningful activities also appear to be a determinant in the selection process. For example, sitting around and chatting, or watching television endlessly, is discussed somewhat negatively. The following excerpt illustrates this.

It's more interesting to spend time with strangers than a lot of time with an old friend who doesn't want to do much in the way of growing. And I'm not being superior when I say this, but lots of people like television, and like clothes. And this is the extent of their conversation. It's nice to be able just to relax and talk idly, but you can't, morning, noon and night. You can't do it constantly.

Among Busy-keepers the need for companionship also forms part of the motivation for taking courses. However, Busy-keepers who express a need for companionship tend to seek companionship among people with similar interests. Thus, the particular interest remains the basis for selection of the activity. In the following excerpts, two teachers describe why they chose education programs as a substitute activity.

I like to be with people like myself, people that are interesting. I like to be with somebody with a common interest. They waken up the interest.

I just wanted something that would take the place of teaching, of going out and meeting professional people. I was hoping to meet people at that particular level.

Participating in a course to accompany a friend is not common, but it does occur. One woman, for example, took a course in Religion for this reason. The outcome of this action was dissatisfaction, because she did not particularly enjoy the course.

Some Busy-keepers have participated in education programs in the middle-age period. The reasons they give for taking courses at that time are to advance a career, to improve performance on the job, to re-enter the job market after a period of not having worked, out of a special interest,

to find a substitute activity after a divorce, or as a preparation for retirement. Except for those people who begin to prepare for retirement in the late fifties, for these Busy-keepers participation in programs in the middle-age period has not been a continuous process once started.

Busy-keepers who begin to substitute activities in the late middle years do so because of decreasing social roles, and an attitude that they should try to maintain an active life. For example, one woman who began to experience role loss when her children grew up and moved out of the home, started to take sewing and exercise programs offered through the local school board. In this way she began to identify ways of keeping busy. Now, as a senior citizen, she says,

I have the interest now. You know what I think the problem is. When people get to be our age, they never plan for retirement. They plan their life on a job and they never think they're going to be that grand old age of sixty-five, and when they reach that magic age, there's nothing.

The educational program is not always the first substitute activity for the Busy-keeper. Sometimes a process of self-development begins through other experiences, which stimulates the Busy-keeper to try new programs. In this way, the Busy-keeper starts to try out educational programs. For example, one woman started to play bingo in her late middle years as her children grew up and moved out. She described herself as being lonely at that time. Later on, after her

husband's death, she went on a trip, and returned, "ready to look for further interests." She attributes her participation in courses to experiences on the trip. She says,

It made me see other things. Whereas I had never been away from home. You raise your children. I was brought up on the farm in a big family and married and had four babies in five years and bring them up, and put them through school, and got them married.

For other Busy-keepers, a process of self-development begins to occur through participation in the educational program. Through learning and skill development, their interest base expands and their attitude to old age becomes modified. For example, one woman, who has been keeping busy through participation in university courses for the past two years, has discovered the joy of learning and the self-development that can occur with learning. Of her old age she says,

I never enjoyed anything as much as I enjoy being retired, because I think you've got such a big world ahead of you.

With the skills that she is developing, a woman in the Toastmasters program begins to look forward to leadership roles in other areas. When she first entered programs, her primary motivation was to keep busy. She had been referred to the program by a counsellor, of whom she had made enquiries for ways of keeping busy.

Another woman in a Yoga class told of how she is learning to "mix" with people, and of her efforts to become involved in a senior citizens' centre. She is skilled at handicrafts, and would like to teach others who want to learn.

Generally, Busy-keepers have had limited activities outside their work, their homes, and their children. Work dominated the middle-age lives of the men, even where there is a dislike for the job. The women carried a larger role repertoire as mothers, workers, and sometimes wives. In addition, most of the women pursued other activities such as knitting, crocheting and gardening.

Social loss through retirement, children growing up and moving out of the home, the giving up of a home for an apartment, and death of significant others have created voids in the lives of Busy-keepers, voids which they seek to fill through substitute activities.

In selecting activities, Busy-keepers show a trend towards falling back on whatever past interests they may have. They are also guided by relevance of the activity for daily living, and the benefits in terms of physical fitness. The narrow range of interests of Busy-keepers sometimes leads to experimentation, to a "trying-out" phase. As they try out new programs, some Busy-keepers demonstrate an expansion of interest areas in old age, and a process of self-development.



Opportunists

Opportunists describe themselves as always having been interested in educational programs. However, opportunities for pursuing these interests earlier in the life cycle were limited. Social conditions, economic considerations, and conformity to role expectations minimized opportunities in the earlier years. This is illustrated in the following excerpts.

I do not think that people start to get education after they get old. I think they've always wanted to take it. Sometimes with the jobs that they've had or the way they've earned a living, they haven't had an opportunity until they get older.

I never had opportunity because when I was a boy, I was out in the field with the cattle. And I wanted education. I didn't care very much at that time because I didn't know any better. But later on I started to think that I should have education.

In my time, only the rich people went to University, and I would have liked to carry on, but Mother was a person who was very just. She didn't want to give more to one than to the other. And whenever you'd discuss that she'd say, "I couldn't do that".

Like the Busy-keepers, Opportunists are people who have devoted their middle-age lives to the role activities of that part of the life-cycle. The women have concentrated on the role activities of mother and wife, and sometimes

worker. For the men, the primary role activity has been that of work. In the following excerpts, Opportunists explain how role expectations of the middle years limited their pursuit of extra activities.

You can't always run all over the place when you're married. When your husband is away at work all day, when he comes home he wants some contact with you and with friends so you don't have that many free evenings.

I didn't have the same routine at all when my husband was alive.

I had to work and bring in the money. I had my son and daughter to look after.

In the old age period, Opportunists find themselves free to determine their own priorities. With more time for themselves, and the availability of educational opportunities, they see themselves free to pursue the education they have always wanted. Some of them describe their reasons for participation as the completion of unfinished tasks. For example, of his participation one may say, "Must be so that I could finish." Other Opportunists express similar sentiments, as the following excerpts illustrate.

I feel as if I haven't got certain things in life. I missed out on them and I should go back and gather them in.

I wanted to use my intelligence. Now that Mother isn't here, I can go out and do things. I was sure I could do something with my life. Now that I am on my own I can go out and do things.

I've always wanted to go back to school and further my education.

Opportunists are motivated primarily by an interest in education. In the following excerpt, one woman explains that it is the interest, rather than an expectation to keep busy, that has encouraged her into programs.

I could always find something to do. I don't feel I have to fill up my life with something. It's because I'm interested and have been, and I have the time now.

Opportunists tend to place a high value on education, and generally hold a liberal view of it. They see education as broadly facilitative of personality development and self-enhancement. One woman expressed it in these words,

Education is very important. Very important...
It gives you a better feeling in life.

Opportunists view participation in education programs as a challenge. For them, education is always useful, as well as enjoyable. They get pleasure from the achievement. One woman sums it up for the group when she says of her participation in the Toastmasters program,

I had never belonged to a club or anywhere where I held an office. I thought, 'Now I am my own boss. I am free, and I am willing to try.' And I kept it. I have learned things that I never thought I could achieve by being willing to learn, and wanting to improve myself, and I found it very, very rewarding, as well as amusing and a good time.

Opportunists participate in a wide range of subject areas such as Toastmasters, Spanish, Creative Writing, History of Art, Sketching, Astrology, Latin, Mythology, and Sociology of Aging. Some of these courses are viewed as highly instrumental, such as language programs for traveling abroad; other courses are seen as highly expressive, such as Creative Writing and Sketching. Some courses are entered into for a broad learning experience, such as Toastmasters.

In their selection of courses, Opportunists tend to combine both old and new subject areas. Among this group, there is a trend towards experimentation, especially among the women. The men seem more inclined to follow up on old interests and old activities. Some Opportunists experiment with University courses, such as Mythology and Sociology of Aging. Only two people in the overall sample took the Sociology of Aging. Both these people are Opportunists. They participated in this program to learn about new ways of living in old age.

Few Opportunists have participated in education programs earlier in the life-cycle. Those who have done so have

taken programs such as Typing, Book-keeping, and general upgrading for career purposes in early adulthood. Their participation in these programs was time-limited, and they did not continue to pursue other educational programs at other times in the middle years.

Approximately half of the Opportunists have attained no higher than a grade VIII formal education level, yet this is a group of articulate people, who plan to achieve a fuller education. Some of these people have learned through their own efforts and through experience. For example, one woman who says, "I'm hungry for knowledge", tells of how she learned.

Int. I get the feeling you wanted to learn.

Res. All the time. I never could find the energy nor time. I read every book I could. I did all the crossword puzzles, got the dictionary out and learned words.

One man describes his earlier learning experiences.

Int. So you didn't get an education?

Res. No. I wasn't good, not up to grade IV. That's what was the trouble. And after that I bought a book and I learned to read.

The view that time is freed up through social loss does not necessarily mean that social loss is a happy event. Opportunists also experience the effects of loneliness and desolation from social loss. This is illustrated in the following statements.

When you quit working you are cut off from everything, and you can look at the T.V., and you can listen to the radio, but you just get somebody else's interpretation of what's happening.

You can't work for twenty-five, thirty years with a group of men, there were some women in the office and so on, and meet them every day, and laugh and joke and this becomes so much part of your life that the day you walk away from it you haven't got that outlet for companionship and so on.

After my husband died I was a little depressed, so I looked for something that would be uplifting as well as getting benefits from it.

Opportunists convey a positive attitude to aging. Accepting of changes through death, children growing up and moving out of the home, and retirement from work, they view old age as a time of other promises and new fulfillments. Interests which lay dormant during the middle-age period reawaken, and Opportunists move into the old age period with renewed eagerness to fulfill old hopes and dreams. For Opportunists, the old age period provides a new lease on life, one in which there are biological contingencies, but one with decreasing social responsibilities, wider social opportunities and options, and more time for oneself.

Continuers

Continuers describe themselves as having been learning most of their adult lives, formally and informally. They view their participation in educational programs as part of a continuing life pattern. The reasons Continuers give for beginning to take programs in the middle years are as an outside activity, out of a value for education, for self-improvement, and for career purposes.

Male Continuers attribute their participation in adult educational programs in the middle years to a value for education and a need for self-improvement. The following excerpts describe how and why they began to participate in programs.

I never went to school until I was twenty-nine years old. I came to this country, I was sixteen. It was 1910 and I started working on the railroads and then the war came on in 1914, and I joined up in 1916. In the First World War I went overseas. And overseas I learned English because wherever I worked there was more Ukrainian spoken on the railroad, and I spoke Ukrainian very very commonly. I don't think I knew any more than two hundred words, my mother's language. I don't think we had to know any more. So when I came back from overseas I want to go to school, but there was no such thing as school for adults in this country. So I went to Chicago for education. I went to Chicago YMCA.

We were the originators of adult education here in Manitoba, long before the University started with their extension courses. We used to get professors to come and give

classes. Our philosophy was adult education. We were trying to promote education among adults, for general knowledge, culture you might say. We were interested in, particularly at that time, politics and social improvements, and we felt people should be informed.

Most female Continuers became involved in educational programs in the middle years through their search for an outside activity. The primary roles of these women at that time were those of mother and wife. In the following excerpts, some of these women describe why they began programs then.

You see there were these three boys and my husband and there was no female contact, and the talk at the table and everything was nothing but guns and cars, and I thought I was going to be driven nuts, so I thought I needed something, an interest of my own.

It was just a means of me getting out in the evenings, away from the children.

The children were in school, and I wanted something to occupy my mind. That was forty years ago. I was just turned thirty, and I didn't like housework.

Two female Continuers began to participate in educational programs in the middle years for career purposes. These women were teachers, and they participated in programs throughout the middle years to enhance their careers. One of these women opted out of teaching with marriage and children, and later on, when her children began to grow up,

she returned to it. This woman might also be considered a participant for leisure-time activities, for even during her non-working years, she engaged in a number of programs.

Only one female Continuer talked of a value for education from childhood days. She described how this value became instilled early in life through childhood experience. She says,

Study was always part of our lives. We were brought up to read and study, and this was ingrained in us very early. I was a Depression child, and money was scarce. Yet my mother always laid aside a certain amount of money for books. In those days there were the little Penguin series, and you could get all the classics. They were twenty cents a book, and we had five dollars worth, and that was our reading. And that was a must for reading for the year. And we did this along with our school work and our other tasks. So really, it was part of our life.

Continuers experience a process of development and growth through their continuing participation in adult education programs. This is expressed in the statement, "One thing leads to another", by a number of Continuers. Generally, female Continuers are more experimental than male Continuers. Throughout the years they develop and expand their interest base. They seem unafraid to try new courses. In addition to craft and language courses, which are based on old activities, they move into new areas such as Yoga, Swimming, Investments, Painting and Ceramics. They tend to relate the selection of new courses to old activities

or past interests, or even to their background, such as "liking" to work with one's hands; or to the instrumentality of the course, such as Yoga for keeping healthy, crafts that can be sold for monetary gain, or a language for a planned visit to another country.

For the most part male Continuers select courses out of past interests or old activities, such as Toastmasters, Creative Writing, Politics, Economics and Religion. Most of these men have been actively participant in social changes within their communities through activities such as the formation of trade unions, the promotion of adult education, the organization of social and recreation groups in the Depression and post-Depression days. For example, one man's response to a question on why he was interested in courses in political economy, was,

Because I organized unions and in working in a union field it was necessary to study trade unionism in Great Britain, trade unionism in America, American tradition of labour and American trade unions because we were handicapped when we were working.

Another man described his interest in Toastmasters and political economy as starting very early in life, and told of how he started to participate in these kinds of courses thirty-eight years ago.

When I came to Winnipeg thirty-eight years ago, Zuken wasn't alderman then, Zuken taught on the Art of Public Speaking, and Penner on Political Economy, and Joe Faulken

on Canadian History. So each student had a choice to pick two courses out of three, because it was not possible to attend three courses during the week. So I decided to take the Art of Public Speaking and Political Economy.

Courses which male Continuers describe as new for them are Psychology and Sociology. Their interest in these courses is associated with their general interest in human affairs and in the social structure. Only two of the men show a trend towards wider experimentation.

For the most part, Continuers are highly involved in the middle age period, and they continue to remain so. They participate in community activities, such as church work, senior citizens committees, sick-visiting, and other volunteer opportunities. These people have been actively involved most of their lives. Only one Continuer indicated a slowing down of pace and some withdrawal from programs due to ill health.

Learning and skill development achieved through education appears to be a factor in the high degree of involvement that Continuers showed in their middle age and continue to show. As they gained added knowledge and skill expertise, Continuers expanded their role repertoire. Female Continuers, for example, began to undertake new roles in the middle years, such as arts and crafts instructors, swimming instructors, volunteerism. Male Continuers moved into committee work, and became more highly involved in the community. The new roles stimulate to further development. One woman describes the developmental stages in her middle age as "cycles".

Continuers continue to participate because learning activities remain significant for them. They are still interested in knowledge and learning, skill development, maintaining social contacts, and having outside activities. In the following excerpts, Continuers describe the significance of their continuing participation in old age.

I'm learning all the time. You just can't help it. Your mind is being kept alert, and that's very important for me.

I am interested in life, generally speaking. If I did not study, I will not know what it is all about. When you study, you understand.

I'm never bored, and I never have enough time to do all the things I want to do. But when I do something and I think it's good, it's real food, it really does a great deal towards self-fulfillment, self-appreciation.

All my life I have been of a philosophical bent, trying to understand what the purpose of life is all about, and the more information I get, the closer I feel I get to the meaning of life. I just seem to be that type, even when I was a young boy.

I guess it's become a way of life with me, and you meet other people. You meet interesting people. And I found that I've always made good friends from these courses.

People say why do you do this when you retire, but it wasn't something that I chose

when I retired. It was something that I'd always done.

Like Busy-keepers and Opportunists, Continuers have also experienced social losses. Some Continuers, principally females, talk of these losses and the possibility of a meaningless life without activities. However, for Continuers, participation in courses is not a substitute activity, but the continuation of a part of their lifestyle.

Summary

Major differences among the three groups of respondents lie in their primary motivation for participating in programs. Busy-keepers are primarily seeking some means of involvement. They want to keep busy, because they believe "busy-ness" is an appropriate form of behaviour in old age. Moreover, they believe that activity of some kind would prevent disengagement, or at the very least, forestall it for some time. Opportunists begin to participate in educational programs because of their view that old age with its added leisure provides free time to do the things they have always wanted to do. One of these is the continuation of their education. Continuers are simply continuing to carry out a role which they have carried for most of their adult lives. Participation in adult educational programs is not new for them.

All three groups of respondents have experienced social loss to varying degrees. Participation in programs,

whether as a means of keeping active, out of a value for education, or to continue a role, sends out a message that these people want to remain involved in some way, through a meaningful role, in the old age period. In seeking to remain involved or "engaged", they attempt to maintain life patterns to the extent possible. Among Busy-keepers there is evident a conscious retrospection into subject areas that at one time held some interest for them. However, because of their generally narrow range of interests, they are sometimes forced into some experimentation to maintain the desired level of activity. Continuers and Opportunists, especially the women, tend to experiment because of their wide range of interests. Their liberal view of education stimulate Opportunists especially, to experiment.

Respondents in all three groups participate in a mix of both old and new subject areas. Opportunists and Continuers reflect a high degree of continuity. This is seen not only in their primary motivation for taking programs, but also in the actual selection of courses.

Among Continuers and Opportunists, experimentation with new course content is generally part of a developmental process. This was expressed by one Continuer in the statement, "One thing leads to another," Opportunists are no different in their thrust for self-improvement, and their view that this could be achieved through education. The major difference between Continuers

and Opportunists is that Continuers were able to launch into programs in the middle-age period.

In their search for programs in the middle years, many female Continuers were not unlike Busy-keepers. The major motivation at that time was to prevent boredom and remain stimulated through an outside activity. However, Busy-keepers do not seek out programs until they find themselves with very little activity, and a fear of disengagement in old age. Yet, as some Busy-keepers have begun to realize, participation in educational programs can lead to self-development, and avenues for participation in other areas.

The selection of some new subject areas is based on an appraisal of the course as being useful in preventing disengagement. While Busy-keepers reflect a high trend towards activity, Opportunists and Continuers are also aware of the facts of old age. Courses such as Yoga, or Current Events are seen as particularly useful.

In conclusion, elderly respondents in educational programs have demonstrated trends towards both activity and continuity to varying degrees. Past lifestyle, range of interests, and attitudes towards old age are factors in whether the individual participates to keep busy, to maintain some form of continuity, or for self-development.

CHAPTER V

CONCLUSION

The findings of this study indicate that generalizations of disengagement and activity as characteristic of the elderly population are not wholly correct. This study has identified three types of elderly participants in educational programs, Busy-keepers, Opportunists and Continuers. These three types emerged out of the primary motivations which respondents described for participation in programs, and are illustrative of varying degrees of both activity and continuity, and of a thrust towards self-development in some people.

These trends towards activity, continuity and self-development suggest that a wide range of educational opportunities at different organizational levels should be made accessible to the elderly to enable entry at the desired point, and to allow movement into new programs as the individual develops and expands his interests. This study did not measure satisfaction levels; however, it seems reasonable to assume that the elderly would find greater satisfaction and more rewarding experiences in courses which can provide outlets for their needs and interests. Again, this study did

not attempt to include drop-outs, so that the incidence of drop-outs, and their reasons for doing so, remains unknown. These are areas for follow-up study.

In line with the above, it is proposed that the availability of educational counselling services would be beneficial to the elderly. For example, Busy-keepers and Opportunists might find it helpful to explore their interests and what they hope to achieve with a counsellor. A counsellor might assist in facilitating entry through informing the potential participant on how the system works, and in directing to programs. A counsellor might also assist by encouraging, listening and helping the individual work out personal feelings, as well as learning to cope with some of the psychological problems of old age.

There are other instances in which a counsellor might be helpful. For example, participants may experience social loss during programs, or may experience difficulty with a particular program, instructor, or method of instruction. Participants may also find that a particular course is not what they wanted, and is becoming burdensome. As some participants begin to develop and expand their interest areas, they may want to explore opportunities for more challenging programs.

A counsellor provides one link to the network of planners and programmers and in this capacity can speak on behalf of participants. He or she is intimately involved

with, and aware of, the needs and interests that the elderly are seeking to fulfill through participation in educational programs. However, the elderly can be, and should be allowed to be, representatives for themselves through boards, committees, and groups. Indications of trends towards continuity and self-development among some respondents suggest that the elderly can assist in the planning stages through information on the kinds of courses they would like, and what they hope to achieve through their participation.

It is possible that many Continuers are involved in integrated courses, as they are knowledgeable of the system through experience. This study did not include participants in age-integrated programs, and leaves this as another area to be explored. It is not known whether these participants are different from participants in age-segregated programs in terms of attitudes, interests, background, etc.

The self-development that some Busy-keepers describe, and which Opportunists are seeking, point to the necessity for careful planning and programming in segregated programs. Whether in senior citizens' centres, through churches, or educational institutions, there should be flexibility in programming, since programs offered through a pure activity orientation can stifle potential for self-development, and become frustrating to some individuals.

Aging in itself is not ignored by participants in programs, and this suggests particular kinds of programs for

aging. For example, some participants take Yoga to keep the body fit and the mind alert. There may be other such program areas which might be explored with the elderly.

Participation in itself implies a desire to remain engaged. This has been explicitly stated by respondents in all three groups when they talk of the need for social interaction, or to be among people with similar interests, or losing friends and opportunities for meaningful interaction through retirement. This raises the question of whether opportunities for social interaction, sharing ideas, and getting to know people are built into the programs, and if not, whether this has resulted in drop-outs. This is a particularly sensitive area, especially if the primary purpose is to learn. This suggests a look at teaching methods, and classroom settings, and perhaps the development of a model or models to accommodate both.

The self-development that has occurred among some respondents and for which other respondents are looking suggests that through the availability of appropriate courses, the elderly might find themselves equipped and ready to participate in other roles in life. While many respondents enjoyed the courses, and viewed the role of participant in educational programs as a viable one for the later years, some respondents anticipated involvement in other areas once they had acquired certain skills and self-confidence. One such other role could be instructors.

Busy-keepers and Opportunists enter programs after a middle-age period away from the educational system. Some respondents have described a need for mental stimulation, learning, and self-improvement, which suggests that a study skills program might have some merit.

Generally, elderly participants in educational programs attest to the concept of education as a lifelong process. They view their participation not only as a pleasurable activity, but as a means of self-improvement, maintaining meaningful engagement, and as a stepping stone to other roles and activities. For them, educational programs provide a viable role for later life.

No count has been taken of the number of individuals who participate in educational programs, but it is assumed that there are others who would like to participate but are unaware of how to gain entry, or lack the self-confidence to try. There may be others who cannot find the types of courses they are seeking, or who become frustrated because of lack of access to what they want. There may be others, such as shut-ins, who are unable to participate.

With the projected increase in the elderly population, it seems worthwhile for policy-makers to take a good hard look at the potential of educational programs for enriching the lives of the elderly. In doing so, it would be noteworthy if further research could be carried out in this area, and attempts be made to look at ways of expanding services to groups of the elderly who are not presently reached.

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APPENDIX I

INTERVIEW GUIDE

- I. INTRODUCTION AND PURPOSE
- II. HISTORY OF CONTINUING EDUCATION PARTICIPATION
- III. SATISFACTION AND EVALUATION
- IV. REASONS FOR PARTICIPATION
- V. GAPS IN CONTINUING EDUCATION BASED UPON INTERESTS
- VI. MIDDLE-AGE ROLES
- VII. CONCLUDING THE INTERVIEW
- VIII. FACESHEET

I. INTRODUCTION AND PURPOSE FOR INTERVIEW

INTERVIEWER:

1. Greets respondent by name
2. Introduces self (omits if respondent and interviewer are known to each other)
3. Reviews purpose for interview
4. Assures re confidentiality
5. Pauses to allow respondent to ask questions.

INTERVIEWER:

Mr. _____, as I mentioned in my letter and later when we talked over the phone, the reason for this interview is to learn about why older people take educational programs. Before we begin, I'd like you to know that your name will not be used in any written reports.

PAUSE.

II. HISTORY OF CONTINUING EDUCATION PARTICIPATION

1. Okay, let's begin with what you are doing right now. I see you are taking (specify course) at (specify institution).

2. Are you taking other courses?

If yes,

3. What?

4. Where?

5. Have you ever taken other courses?

If yes,

6. What?

7. Where?

8. When?

If respondent speaks only of courses since retirement

9. I see that you have taken a number of courses since you've retired. Have you ever taken courses before you retired?

If yes,

10. What?

11. Where?

12. At what point in your life?

III. SATISFACTION AND EVALUATION

RE: COURSES CURRENTLY TAKING:

1. How are you enjoying the courses you are taking?
2. What do you feel you are getting from them?

RE: OTHER COURSES SINCE RETIRED:

3. How about these other courses since you've retired, the (specify course) and the (specify course)?
4. What were you looking for?
5. What did you really get?

RE: COURSES PRIOR TO RETIREMENT:

6. And what about (specify course) and (specify course) that you took before you retired. What made you take these?

TAKE CUE:

7. A. You indicate an interest in (specify course) and I'm wondering how the course worked out for you in terms of your interest?

OR

- B.(i) I see, it was part of your job. What were you doing at the time?

(ii) How did it help you in what you were doing?

(iii) If it didn't help--

You feel it didn't help you any. How come?

Or, What were you expecting it to do for you?

(iv) Apart from the job, what were you hoping to get out of the course, like for yourself?

If respondent talks about personal interests,

- (v) An interest in (specify course or subject area)
When did you begin to feel that you would like
to take (specify course or subject area)

IV. REASONS FOR PARTICIPATION

1. You've mentioned a number of reasons for taking
(specify courses)

Perhaps there are other reasons that you would
like to talk about?

2. TAKE CUE FROM ANSWER

If reason given, begin to probe,

Can you tell me a little more about this interest?

(Try to find out when and how it started)

If interest started when quite young,

What did you do about following it up?

If answer negative, and no reason given,

How come? Were you doing other things at the time?

If interest started only since retired or quite

recently, follow up with,

I imagine you were involved in other things before
you retired?

PAUSE FOR ELABORATION;

If not forthcoming, encourage

What were some of these things you were doing at
the time?

If response is,

"I always wanted to"

Explore meaning of "always wanted to" --

as a child?
in high school?
in middle-age?

Again, What did you do about following up your interests?

Did you belong to a club,

a church group,

a recreation centre?

If answer is didn't follow it up,

or didn't have the opportunity

How come?

What was happening to you at this time?

Why didn't you? etc.

PICK UP CUES AND GO AS FAR AS RESPONDENT IS WILLING TO

INTERCHANGE HERE WILL BE BACK AND FORTH -

FROM PRESENT TO PAST TO PRESENT.

V. GAPS IN CONTINUING EDUCATION BASED UPON INTERESTS

"We've talked quite a bit about the program/s you are taking and your interests. I am wondering if there are any programs you would like to take based upon any other interests that you have, whether they are offered or not.

A. If answer is no

"So you are saying that you are pretty well satisfied with what you are getting now."

(Check and leave room for elaboration if respondent wishes)

OR

B. If answer is given in terms of a course of interest, take cue,

You have an interest in (specify)

(Verifying and encouraging elaboration)

If not forthcoming, this interest in (specify), how did it begin?

(i) I see, you have an interest in, (specify) and I'm wondering if you were following it up at that time.

Follow up on cues - How come?

I see, you were busy at the time.

What were you doing at the time?

Etc.

VI. MIDDLE-AGE ROLES

I wonder if you would share with me some of the things you were doing before you retired. I am particularly interested in what life was like for you from the time you were about thirty to the time you retired.

If respondent hesitates, or questions, level -

I'm trying to understand what middle-age is like because I think it helps to give us a better picture of older people.

If respondent says, I haven't really changed, say,

I have a feeling this may be so, and this is why I hope we can talk about it.

If respondent answers affirmatively,

Respond to encourage elaboration

I see that you've led an interesting life

OR I see that you've had many different kinds of experiences over the years.

OR You've said that....

If respondent doesn't talk, initiate,

- (i) Maybe we could begin by talking about what a typical day was like for you before you retired? What were some of the things that you did.
- (ii) Was everyday practically like this?
- (iii) So you would say that you generally followed a daily routine. (Checking)

OR So you would say that some days were different,
depending on what was happening.

RETROSPECT: Find out about - Conjugal ties and roles,
Parental roles,
Friends,
Brothers & sisters,
Significant others,
Church affiliation &
involvement,
Political affiliation &
involvement,
Leisure-time pursuits,
Recreational activities,
Club memberships, etc.

To round this off, I wonder if you could describe
for me a typical day in your life in your forties.

OR
You've told me quite a bit, but I wonder if you could
describe a typical day in your life in your forties.

VII. CONCLUDING THE INTERVIEW

We seem to have talked for quite a while, and I'm
sure the information you gave me would be helpful.
Before we finish up, I am wondering if there is any-
thing else you would like to talk about.

VIII. COMPLETE FACESHEET

Okay, Could I just check some information with you.

(Interviewer should have most of the information
beforehand. Check where necessary)

Age:
Sex:
Marital Status.

Institution Representing:
Program/s:

APPENDIX II

INVITATION TO PARTICIPATE IN STUDY

October 28, 1976

Dear _____,

May I invite you to participate with me in a research study on Education and the Elderly. The purpose of the study is to gain an understanding of why older people participate in educational programs.

My interest in educational programs for older people began approximately three to four years ago when I worked with Age and Opportunity Centre in helping to establish programs through the Institute for Continuous Learning. At the present time, I am a Master's student at the School of Social Work, and this study is part of my educational pursuits. Apart from this, I believe the study would be useful in terms of helping those of us who work in the field to gain a better understanding of the educational interests of older people.

Your agreement to participate would involve an interview of approximately one hour with me at your home at a time convenient to you. The interview would deal with your educational interests, and how these interests evolved. While the information obtained will be incorporated into a report, you personally will not be identified in the report.

I shall be in touch with you by telephone to arrange for an interview, should you agree to participate. In the meantime, should you wish to contact me for further information, my phone number is _____ and I'm usually at home after 7:00 p.m.

I look forward to having you participate with me in this study.

Yours Sincerely,

Maureen Rampersad