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## Differences in Learning Motivations of Professionals and Nonprofessionals Participating in Two South Mississippi Institutes for Learning in Retirement

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The University of Southern Mississippi


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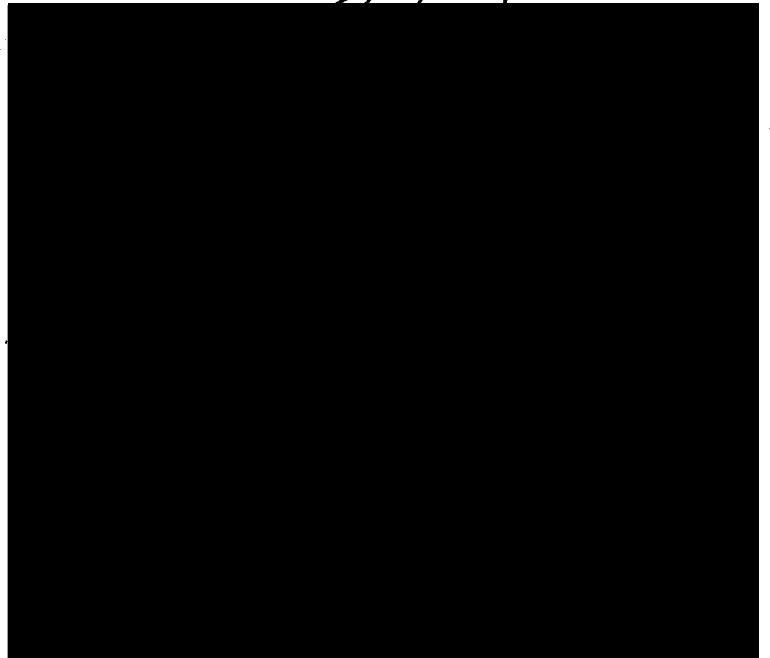
by

Constance Marie Farmer

A Dissertation

Submitted to the Graduate Studies Office  
of The University of Southern Mississippi  
in Partial Fulfillment of the Requirements  
for the Degree of Doctor of Philosophy

Approved: 



May 2008

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DIFFERENCES IN LEARNING MOTIVATIONS OF PROFESSIONALS AND  
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## ABSTRACT

# DIFFERENCES IN LEARNING MOTIVATIONS OF PROFESSIONALS AND NONPROFESSIONALS PARTICIPATING IN TWO SOUTH MISSISSIPPI INSTITUTES OF LEARNING IN RETIREMENT

by Constance Marie Farmer

May 2008

This study investigated the differences in learning motivations of (a) professional and nonprofessional, and (b) urban and rural members of two south Mississippi Institutes for Learning in Retirement (ILR) programs in an attempt to expand C. O. Houle's conceptual model of continuing professional education into the retirement years and to determine if the life transitions of the older adult unite the learning orientations of these subpopulations into self-actualizing (growth) motives as part of the maturation process identified by Abraham Maslow.

Ninety urban ILR and 60 rural ILR members were recruited. Professional was defined as having completed a bachelor's degree or above and licensure, certification, or registration. Variables were measured quantitatively using Roger Bashier's Education Participation Scale A-Form and qualitatively using open-ended questions on a demographic data survey collected using a one-time cross-sectional assessment of six intact groups at each location. Data were analyzed by multivariate analysis of variance, chi square, and content-thematic coding.

Significant findings (.05 level) indicated that nonprofessionals have pluralistic motives while professionals are motivated by intellectual curiosity. Cognitive Interest was

the strongest motivator for all persons surveyed followed closely by Social Contact. Rural participants were more likely influenced by all motivational orientations than were urban members. Adventure learning for fun and pleasure was identified as a separate category from qualitative analysis. These findings are similar to the findings of previous research but expand the knowledge of the professional model into the postcareer years as well as providing a clue to learning motives for isolated, disadvantaged older adults who can benefit from expanded availability of programs into difficult to reach areas. These conclusions suggest that the needs of the often hard-to-reach older adult can be met with the ILR model and that additional models to include the underserved elderly populations should be developed.

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## CHAPTER I

### INTRODUCTION

#### Background

With advances in modern medicine, active lifestyles, and preventative health care, adults in the United States are living longer than ever with more productive lives. The baby boom generation began to turn 50 in the year 1996, and with the influx of social changes throughout their lifespan they will likely change the scenario of aging as well. In 2002, there were over 34 million adults age 65 and over (Snyder, Edwards, & Folsom, 2002). The baby boom generation is expected to raise this number to 66 million by the year 2030 (American Administration on Aging, 1977 as cited by Fisher & Wolf, 2000). Currently, the elderly (60+) generation makes up an estimated 20% of the American population.

These baby boomers, in general, are better educated and more demanding with a selfish reputation as the “me” generation. This group of adults is better educated, more technologically savvy, and prone to middle-class standards of living. As of 2001, 52.1% of those age 75 and older had achieved high school education or better. For the 55 to 64 year old age group, those with high school or more education represented 74.3% (Adams, 2001). The older adult is most likely to suffer multiple life transitions at the same time. Death of a spouse, lost or changing jobs and careers, an increase of leisure time through retirement, changes in the health of self or a loved one, and changes in religious outlooks can all lead to emotional, psychological, and social isolation or new opportunities for learning (Spencer, 1980).

In response to the demographic changes of the baby boomer, Social Security laws have increased the retirement age. This fact alone will bring unprecedented life transitions and social role changes in work, leisure, and enrichment learning. Advancing age and longer life spans will serve to increase these transitions. Older adults will need and continue to seek skills to maintain their independence utilizing the time allotted to the remainder of their lifespan pursuing functional roles in the maintenance of society. Older baby boomers represent a new market for educational programs since they will likely spend more than one-quarter to one-third of their lives in later adulthood.

Institutes for Learning in Retirement (ILR), created in 1962, will be the next institution affected by the baby boom generation born between 1946 and 1964. Although the ILR system is now over 40 years old, little research has been done specifically on this population. ILR members pay dues to join institutes offered at colleges and universities that usually provide space and administration for classes. Members design their own programs and attend peer-taught noncredit courses (Martin, 2003). As a model of adult education, this is a program that is almost perfectly self-directed. In addition to there being little research on ILRs, there is limited knowledge of professional lifelong learning after retirement. Brown (1990) reported that professionals placed a heavier demand on the educational system than any other group. Highly educated, professional baby boomers will be looking for learning opportunities in late life as well. Houle (1980) and Cervero (1988) wrote extensively about the lifelong learning habits necessary to develop, establish, and maintain the professions.

It is the intent of this study to examine the participation of professionals and nonprofessionals and their motives for learning as well as compare a rural community

college ILR with a more urban university-based ILR. A study such as this will extend Houle's (1980) and Cervero's (1988) observations about professionals into their post-career years and provide insight about learning to a group of underserved rural elderly. The determination of lifelong habits can aid program planners, teachers, and administrators in adapting course offerings to meet the growing demand for education that will likely be placed upon the shoulders of the ILR system in the near future. As more community colleges open ILR programs, a study such as this can provide useful marketing information. Professionals have traditionally separated themselves in the rigors of academe through continuing professional education unique to their associations and members while the underserved, rural, and minority members of society have sat outside seemingly beyond the reach of education. If ILR can reunite the interests of the professional and nonprofessional in retirement, perhaps it can explain, predict, and motivate potential participants from a broader spectrum of the elderly population.

#### Statement of the Problem

The problem addressed in this study was: What motivational factors influence older adults participating in two Institute for Learning in Retirement (ILR) programs and to what extent do these motivational orientations vary by the following variables: the subjects' professional or nonprofessional status, rural or urban ILR, age, gender, educational level, income level, race, marital status, and employment status.

#### Hypotheses

1. There will be no statistically significant difference between professionals and nonprofessionals in motivational factors for participation in the Institute for Learning in Retirement program.

2. There will be a statistically significant difference in motivational factors between Institute for Learning in Retirement participants at a rural college and those at an urban university.

3. There will be a statistically significant difference in the motivational factors for learning between the young-old (age 50 to 64) and the old-old (age 75 and older).

4. There will be a statistically significant difference between the number of professionals and the number of nonprofessionals in the two south Mississippi Institute for Learning in Retirement programs.

#### Definition of Terms

*Adult Education* - educational program or activity established to meet the learning needs of adults over 25. The present study focused on learners over age 50.

*Age* - Operationally defined and measured by self-reported categories of (a) 50-64 (young-old), 65-74 (middle-old), and 75 or older (old-old).

*Continuing Professional Education (CPE)* - voluntary or mandated educational activities undertaken to maintain and improve professional skills in compliance with government or associational licensing/certification or relicensing/recertification requirements.

*Educational level* - operationally defined in level of education completed: (a) less than high school, (b) high school graduate, (c) some college, (d) community-college or trade school, (e) associate degree, (f) bachelor's degree, and (g) advanced degree.

*Education Participation Scale (EPS)* - a tested research instrument consisting of Likert scale items utilized to measure motivational factors for participation in adult education.

*Employment status* - operationally defined and measured by participants' self-report as follows: (a) full time, (b) part time, (c) self-employed, (d) retired, and (e) volunteer.

*Income level* - operationally defined and measured by participants' self-reported annual income as follows: (a) less than \$15,000, (b) \$15,000 to \$40,000, and (c) over \$40,000.

*Institute for Learning in Retirement (ILR)* - a program for peer-learning offered through a membership network for retired and semiretired persons sponsored by colleges and universities and administered through the Elderhostel Institute Network that serves the educational and social needs of older adults through peer-taught or professionally-taught educational activities.

*Learning project* - a series of related episodes, adding up to at least 7 hours devoted to learning and retaining knowledge to produce a change in oneself (Tough, 1979).

*Marital status* - operationally defined and measured by participants' self-report as follows: (a) married, (b) widowed, (c) divorced or separated, (d) single, and (e) other.

*Motivational factor* - operationally defined and measured by the Education Participation Scale (EPS) which includes seven factors: (a) communication improvement, (b) social contact, (c) educational preparation, (d) professional advancement, (e) family togetherness, (f) social stimulation, and (g) cognitive interest (Boshier, 1971, 1991).

*Motivational orientation* - social and psychological determinants of participation in educational activities usually determined by a Likert scale of items which have been clustered through factor analysis (Prichard, 1979).

*Older adult, older person, senior citizen, or elderly* - for the purpose of this study, an individual 50 years old or older participating in an Institute for Learning in Retirement program in South Mississippi.

*Professional* - a member of an occupational group that utilizes the characteristics of the professional model as identified by Houle (1980) and Cervero (1988) which includes (a) a specialized and unique body of theoretical knowledge; (b) preservice training; and (c) licensure, certification, or registration. Refer to the Review of Pertinent Literature for more information regarding the professional. For the purpose of the present study, a professional is limited to persons having (a) licensure, registration, or certification requirements and (b) 4 years' formal education beyond high school and/or an internship or preservice training program.

*Race* - measured by participants' self-report as follows: (a) Black or African American, (b) White or Caucasian, and (c) other.

*Third age* - refers to the middle adulthood years represented by the third quarter of a 100 year life span encompassing the ages 50 to 75 years.

#### Delimitations

1. The study was confined to two Institute for Learning in Retirement (ILR) programs: One was the Osher Lifelong Learning Institute (OLLI) located at The University of Southern Mississippi (USM) and the other was located at Southwest Mississippi Community College.



University of Southern Mississippi (USM) and the other was located at Southwest Mississippi Community College.

2. The variables of this study were limited to professional or nonprofessional status, rural or urban ILR, age, gender, income, educational level, race, marital status, and employment status.

3. All conditions, participants, and variables not otherwise stipulated were considered to be beyond the scope of this study.

#### Assumptions

1. Responses to all survey questions were assumed to be truthful and accurate.

2. Course titles at each of the ILR programs described similar content and course objectives.

#### Justification of the Study

There were theoretical and several practical reasons for conducting this study. Although much has been written about learning within and among professionals during their peak work years (Cervero, 1988; Houle, 1980), no research was found specifically on the motivations of professionals in their post-career years when continuing professional education (CPE) for relicensure is no longer necessary. During a professional's career, learning is motivated by the development and maintenance of skills. Maslow (1962) notes in his hierarchy of needs as learning motivators an increasing tendency toward growth needs (esteem and self-actualization) during the maturation process to fulfill one's capacities. Cross (1981), likewise, lists age in her Characteristics of Adult Learners (CAL) model as a personal and situational factor leading to growth that

serves as a motivation in socioculturally age-appropriate readiness to learn. The present study extended the theory behind the professional model of lifelong learning beyond the years of continuing professional education for licensure and relicensure needs and interests to define motivational changes by professionals over time. It also extended the knowledge of growth-oriented learning within the subpopulations studied.

The nonprofessional generally represents a lesser educated, less affluent learner. These individuals are less likely to engage in educational activity. Barnes (1987) indicated that when the disadvantaged do participate, they are enriched by the experience. Heisel, Darkenwald, and Anderson (1975) addressed the need to extend programs to lesser educated, less affluent, disadvantaged, and underserved elderly many of whom live in rural areas and urban ghettos. This study was intended to add to the existing database of knowledge gleaned about the motivations of the rural older adult. Smaller community colleges will be able to utilize the information from this study to develop programs for the underserved elderly.

Morstain and Smart (1974) and Birren and Woodruff (1973) addressed the need to study periodically and monitor cohort groups to reevaluate programs to meet the needs of succeeding cohort groups. The new age of participants within the baby boom generation provides a demographically challenging group upon which to base the characteristics and attitudes of potential learners for program development and marketing. This study was designed to add to the knowledge base by comparing older cohorts to younger cohorts of late life learning.

There have been relatively few studies in various geographic regions of the United States on Institute of Learning in Retirement participants. Bynum and Seaman (1993),

of participants and to further research on the variables of motivation, socioeconomic status, age, gender, and educational attainment. This study proposed to add to the growing database of knowledge about the characteristics and motivations of ILR participants.

Douglah (1970) and Sprouse (1981) point to a desire by adult education professionals at every level of the organizational chart from teachers and planners to consultants, researchers, and administrators to find ways to increase enrollment, make learning experiences relevant, and provide marketing strategies for specific audiences by explaining why differing groups of people attend programs. This study provided insight and information for making decisions about the kinds of programs to offer when looking to expand offerings or clientele appeal. This study attempted to fill a void in the research to address future programming needs and to provide better educational opportunities for older adults by investigating the differences between professional and nonprofessional participants of the Institute for Learning in Retirement system.

## CHAPTER II

### REVIEW OF PERTINENT LITERATURE

#### Theoretical Framework

Adults participate in learning due to an interrelationship of psychological and environmental factors (Cross, 1981; Merriam & Caffarella, 1999). This study has foundations in three theoretical models based on: (a) Houle's (1961) study of motivational typology of learning-, goal-, and activity-oriented objectives, (b) Maslow's (1962, 1970, 1971) assertion that self-actualizing behaviors increase with age-related maturation, and (c) Cross's (1981) characteristics of adults as learning model of personal, situational, and physical changes that occur with life stage transitions and chronological age. Houle (1961) developed a rather simple typology for learning motivations after studying 22 people actively engaged in adult education via in-depth interviews. He linked the reasons for learning by adults into three basic groups. One group he called goal-oriented learners because the learners in this group had a distinctive objective for their learning. Another group, that he termed learning-oriented learners, enjoyed learning and sought knowledge purely for its own sake. The final group he labeled activity-oriented and determined these to be learners without ties to course content or goals but studied with perhaps social reasons in mind. In addition, Houle (1980) rather extensively reviewed the learning habits of professionals as a group in varying occupations and indicated that professionals not only studied for theoretical applications of knowledge in their chosen field of study, but also pursued knowledge for a broader "self-enhancing personal dimension" that allows the professional to solve problems in practice using knowledge gleaned from other areas of interest (p. 47). According to Houle, continuing

professional education (CPE) has at its base the utilization of the best ideas, techniques, and practices. These ideas, techniques, and practices continually need to be modified, replaced, and/or updated. Constant change provides the incentive for learning in all continuing education, but

professionalizing occupations design their learning programs around four goals or categories:

1. Maintenance and modernization of practice - whereby the practitioner updates skills.
2. Preparation for change - learning new or special skills to assume role changes within the profession.
3. Induction to new responsibilities - learning new skills for upward mobility or new service provision.
4. Refresher training - learning to reorient the practitioner who has not recently engaged in practice.

Although the goals of CPE are usually limited to knowledge acquisition, there is a social component within professional groups felt by all but the isolated practitioner and hierarchical heads within organizations. The side effect of social interaction within the professions is a deeper understanding of colleagues and varying perspectives of practice for future use (Cervero, 1988; Houle, 1980; Larson, 1977).

Cross (1981; Merriam, 1993), in her Characteristics of Adults as Learners (CAL) framework, lists personal (physiological, sociocultural, and psychological) and situational categories of learning as a basis for motives in learning. Aging fits in both the personal continuum as a physiological change and in the situational continuum as the life stages

related to chronological age. Both personal and situational learning categories can provide motives for learning as a means of accepting age (mellowing—e.g., accepting health problems, death of spouse or friends, retirement, and changes in income, living arrangements, and daily routines). There is an andragogical component (Knowles, 1970; Knowles, Holton, & Swanson, 1998) within the CAL model. Self-concept is seen as part of adult development and is envisioned by Cross (1981) as growth. Problem-centeredness in learning is an essential orientation of the voluntary component in the CAL model. Readiness to learn is ingrained in this developmental concept as part of the sociocultural continuum associated with expected age-appropriate behaviors. This aspect of the CAL model speaks directly to the older adult engaged within the community. The older adult uses the interaction of these factors to make meaning of his or her life experiences as he or she transitions into the next phase of the life cycle. The transitions of the life cycle (including retirement) provide high learning motivations (Aslanian & Brickell, 1980).

Abraham Maslow (1962, 1970, 1971; Schermerhorn, 2004) placed motivation in the form of a needs hierarchy. In his view, five fundamental physiological and psychological needs ranging from a basic or lower order of needs (physiological, safety, and social needs) to a higher order of needs (esteem and self-actualization) concern the individual and serve as motivating factors for individual behavior. Lower order needs must be satisfied or fulfilled to some extent before the individual is moved to pursue the higher order needs. Movement from lower to higher order needs is not constant and may flow forwards or backwards if certain deficits develop within the individual. Thusly, Maslow (1962, 1970) termed the lower order needs which arise in a state of deprivation as deficit or deficiency motivators. He termed the higher order needs as growth

motivators since they provide an ongoing and never-ending quest to fulfill one's capacities. Education and the acquisition of knowledge, according to Maslow (1962, 1970), can serve to fulfill either basic lower order needs or to express self-actualization. Maslow (1962, 1970) further implies that self-actualization is a part of the maturation process found commonly among older, successful adults like the ones he studied in the United States (1971). Boshier (1977) further argued Maslow's (1962, 1970) theory of needs hierarchy, renaming the lower order deficiency needs as "life chance" and the higher order growth needs as "life space." Boshier (1977) also associated growth with advancing age and/or increases in socioeconomic status. In 1983, Boshier and Collins linked high occupational status with learning for learning's own sake (i.e., Cognitive Interest). Boshier (1971), unlike Houle (1961), believes that all learning in adult education is goal-directed and, like Maslow (1962), feels the distinctions between growth and deficiency motivators are dependent upon the individual and where he or she fits along the needs hierarchy.

#### Definitions of Age and Retirement

There are three major ways of defining age or aging. One is chronological; another is biological or physical; and a third is psychological or developmental. Chronological aging is a social phenomenon which attempts to measure time in increments of neatly graphed units (Neugarten & Moore, 1973). Chronological age is more descriptive in youth when physical or social experiences are most similar. Using the passage of time as an indicator for group characteristics becomes less descriptive with increasing age in years (Lamdin, 1997).

The use of age as an identifying factor for old age and retirement began in 1861 when the federal government required all naval officers below the rank of admiral to resign at age 62. The first corporate retirement plan in the United States with some paid benefits occurred in 1875 when American Express allowed persons over age 60 with 20 years of company service to retire. In 1920, the first compulsory retirement and disability plan was mandated for civil service workers. Despite this activity on the retirement and disability fronts, more than 80% of all retirement pensions were paid by the military. It was not until 1935 that the Social Security Act defined partial retirement as age 62 and total retirement as age 65 (Achenbaum, 1994; Rose, 1973). Since there was high demand for labor to support the war, few people retired before the end of World War II. Even after the war, life expectancy was on average one to 2 years beyond age 65 and most people worked until death or disability. In the 1950s and 1960s, the beginning of the second middle age (age 50-75) was termed the third age (Jarvis, 2001; Laslett, 1987) and represents the third quarter of a 100 year life span chronological age provides a simple measure for data collection (such as census data) or for the provision of services (such as reduced fares for transportation or discounted meals in restaurants).

During the 1960s and 1970s, this third age became the age of early retirement when businesses began offering early retirement incentives to persons 50 years and older. As the baby boom generation aged, these early retirements became increasingly popular as a means of reducing labor costs when human resources were plentiful. Although early retirement peaked in 1986, it is still occurring at sizeable rates. In the period between 1990 and 1996 at least 75% of all retirees were age 62 or younger. Despite the passage of the Age Discrimination in Employment Act which extended mandatory retirement to age



70, increased life expectancies where retirees can expect to spend over one fourth to one third of their life span after retiring, and the redefining of total retirement by the Social Security Administration as age 67 for baby boomers, retirement practices have only marginally been affected. For example, in 1996, 75% of retirees retired at the age of 62 or younger; 9.6% were age 65, and 9.2% were over age 65. The remaining 6.2% retirement rate was from permanent disability at any age (Larock, 1997).

Biological or physical aging is more readily recognizable. It is a fact of life: graying hair, hair thinning or loss, weight gain, or changes in body shape are common manifestations of old age. Although better nutrition, medical advances, and preventative healthcare have increased life expectancies, mankind has not altered the maturational process (LeFrancois, 1996). Optimum physical capacity occurs in young adulthood followed by a slow decline in major biological functions. The biological process reaches its turning point near age 40 or 50 but may not be noticed until age 60 or 70 when obvious physical changes occur. It is about this time in the life span that three changes in physical states due to aging are seen: (a) change in health as a result of disease, (b) declining reaction time, and (c) vision and hearing losses. Until the 20<sup>th</sup> century, it was biological aging that led to retirement. People either worked until they died or became disabled. But in today's society, an accumulation of experiences and education can offset declines in speed, memory, or vision-motor flexibility (Bates & Schaie, 1974). Physical exercise (Googin & Stelmach, 1990) and physical training and mental conditioning (Stones & Dawe, 1993) can minimize and/or reduce physical age losses and even improve cognitive abilities.

The final concept of aging is viewed in a progression related to internal changes over the lifespan. Encounters with the individual's environment are used to explain psychological development. Theories about psychological aging may or may not link change to age, but they all link changes to a sequence of events or milestones in the adults' life (Jarvis, 2001; Levinson & Levinson, 1996; Merriam & Caffarella, 1999; Neugarten, 1976). Each stage or phase of development is preceded by a life transition requiring social choices and is followed by a relatively stable period of age-appropriate behaviors that foster new learning experiences. The adult age usually begins with early adulthood or a transition into early adulthood characterized by establishing independence from parents or the beginning of employment for income leading to various stages of middle adulthood characterized by marriage and childrearing and culminating with late adulthood and old age which includes such late life issues as retirement from work for pay, death of a spouse or friends, and changes in health (Laslett, 1987). In the 1940s and 1950s, late life events and transitions were viewed as negative situations. Such negative viewpoints led to disengagement theories whereby such events led to the individual's withdrawal from relationships and interests gradually so that his or her passage into death left little impact upon others (Lamdin, 1997). This was age appropriate "graceful aging." The disengagement theory was a male-oriented phenomenon since many women who were full-time homemakers were never allowed to withdraw from their caretaking duties until widowhood (Cumming & Henry, 1961). In the 1960s and 1970s, researchers began to question disengagement when studies revealed a positive correlation between social interaction and psychological well-being in people aged 50 to 70 (Neugarten, 1976). This

psychological third age has come to represent a time of fulfillment through leisure activities and the development of self-worth (Lamdin, 1997; Laslett, 1987).

### Participation Studies

There have been numerous studies to determine who the likely participants in adult education are. Johnstone and Rivera (1965) conducted the first national study to determine who participated in formal and informal education. By defining the educational activity as “a continuous and systematic effort to acquire knowledge” (p. 1), they found that approximately one in five adults (those 21 or over, married, or head of household) had engaged in some form of learning in the 12 month period prior to June 1962. Johnstone and Rivera (1965) further found that 61% of the adults surveyed had undertaken study in full-time, part-time, or independent study in their adult lives since leaving formal schooling. Nearly four out of five (79%) of the participants in adult education were under the age of 50 in this study. Persons in their seventies and older only participated at a rate of 4%. After age 50, increasing age correlated with a significant drop in levels of participation with men dropping out at significantly higher rates than women. Rates of participation for the age group 50-59 and 60-69 were 13% and 6%, respectively. With the exception of gender differences with advancing age, men and women shared equal propensity to participate in adult education. Socioeconomic factors that affected learning were educational level, occupational status, and income. These correlated positively with educational participation. White collar workers with a college education making \$7,000 or more were more likely to participate than any other group of participants. Blacks were equally likely to participate as Whites with similar educational

levels. Basically, the typical learner was married, had children, was a full-time worker, and lived in an urban center, most likely a suburb.

Additional findings of the Johnstone and Rivera (1965) study were:

1. Where programs and resources for adult education were plentiful, more adults used them.
2. The earning of formal credit was not important to learners by a margin of 5:1. Eighty-three percent of survey respondents took courses without getting credit for them.
3. Seventy-two percent of learners worked, of which 9% were part-time workers.
4. Professionals were the largest category of participants (23%) compared to a high of 18% participation by craftsmen and tradesmen and a low of 1% for farm workers and 2% for farmers and farm managers.
5. The median educational level of participants was 12.2 years compared to an educational level of 11.5 years for the total sample.
6. Participation in small metropolitan areas was the highest level reported (45%) followed by large metropolitan areas (25%). Small cities had smaller participation rates (13%) than small towns and rural areas (16%).
7. The overall rate of participation in adult education was 22%.

Six triennial surveys conducted by the National Center for Education Statistics (NCES) in the years 1969, 1972, 1975, 1978, 1981, and 1984 and two additional studies in 1991 and 1995 revealed increasing participation rates in education for all age groups in the United States population over more recent decades since 1965 (as cited by Merriam

and Caffarella, 1999). Although the definition of adult changed from age 21 or over, married, or head of household to age 17 or over and educational activity was redefined to include part-time learning, a trend towards increasing participation has ensued. Overall participation rates increased from 10% in 1969 to 14% in 1984, to 38% in 1991 and 40% in 1995. By 1999, overall participation in adult education had risen to 45.7% (U.S. Department of Education, 1999).

The median age of participants in Johnstone and Rivera's (1965) study was 36.5 years. By 1991, those persons had added an additional 26 years to their lives. Participation rates of the older adult defined as age 50 and over who were participating in any educational activity part-time for more recent studies are shown in Table 1. The trend towards increasing participation held for older learners also.

In a more recent national participation study, Kim, Collins-Hagedorn, Williamson, and Chapman (2004) show that participation in adult education has continually increased for all age groups over the past 3 decades. Forty-six percent of adults age 16 years and over not enrolled in elementary, secondary, or full-time formal diploma or degree programs participated in formal coursework or training part-time or in informal learning. This figure is up from 40% in 1991 and 45% in 1995. In this study, 49% of females participated compared to 43% of males. Since 1978, this higher percentage of participation among women has been the trend (Merriam & Caffarella, 1999). College graduates and those with some college education participated at the highest rates (66% and 38%, respectively). Thirty-four percent of high school graduates compared to 22% of participants who had not completed high school had engaged in educational activities during the 12-month period prior to the survey. In addition, employment status and

Table 1

*Percentage of Participation in Part-time Adult Education Activities by Older Adults*

| Age               | 1991 | 1995 | 1999 |
|-------------------|------|------|------|
| 50-54 years       | 26.8 | 42.5 | 49.4 |
| 55-59 years       | 29.0 | 32.2 | 39.0 |
| 60-64 years       | 17.4 | 23.7 | 34.3 |
| 65-69 years       | 14.2 | 18.1 | 24.4 |
| 70 years and over | 8.6  | 13.8 | 16.8 |

Adapted from: U.S. Department of Education, 1999 data.

occupation correlated positively with increased participation. Professional and managerial occupations (including 64% of professionals with continuing professional education requirements) had a higher rate of participation (71%) than those of other occupations. Sales, service, and support occupations (with 55% participation rates) had higher rates than persons engaged in trade occupations (34%). Income and whether a person had worked for pay also correlated positively for participation. People in households with incomes greater than \$50,000 were more likely to participate than those with \$50,000 or less (28% vs. 48%). Those who had worked for pay in the 12-month presurvey period participated at a rate of 54% compared to 25% of those who had not worked. Consistent with previous participation studies, the typical adult learner in work-related courses was more likely to be of White, non-Hispanic race/ethnic origin, to have some education beyond high school, to be a professional or manager with continuing professional education requirements, to have worked in a professional or managerial occupation, to be age 31-50 years old, and have children living within his or her household. Work-related courses accounted for 30% of courses taken; whereas, personal interest courses were pursued at a rate of 21%. The typical learner in personal interest courses tended to have completed some college or higher education, to work in a professional or managerial occupation, to have continuing professional education requirements for licensure or certification, and to have never been married. Other findings of this survey include the following:

1. The main reasons for participating in work-related courses were for maintaining and improving skills (95%) and learning new skills, techniques, and methods (84%).

2. Higher levels of incomes were associated with increased participation in personal interest courses and informal learning.
3. White, non-Hispanics participate at a rate of 47%. Blacks participate at a rate of 43% while Hispanics participate at a rate of 42%. These rates are not statistically significant.
4. The 41-50 age group has the highest rate of participation to date (51%). Rates for other groups were in descending order by ages 16-40 (53%) ages 51-65 (41%) and 66 years and older (22%).
5. Only 4% of older workers (age 66 and over) participated in work-related courses whereas 28% of 16-30 year olds and 51-65 year olds studied work-related courses.

Overall participation rates since Johnstone and Rivera's (1965) study have shown consistent increases. The typical adult learner is still under 40, educated, works full-time in a white-collar occupation with above-average income, and is married with children. But participation in the 41-50 age category has increased significantly. Older adults over 65 years are still the least likely participants in adult education. Since 1978 females have consistently participated at higher rates (Kim et al., 2004; Merriam & Caffarella, 1999). Females in 2001 showed a continuation of this trend (49% compared to 43% of men). Although the percentage participation by race/ethnicity is different, these differences are not significant. Overall participation increases with educational attainment and occupational status is consistent with previous studies (Creighton & Hudson, 2002). When personal interest courses are considered, participation among age groups is not significantly different. Persons aged 66 and older participate in these courses at a rate of



19%. The only age group with a higher rate of personal interest course participation was the 16-30 year age group (24%). Persons taking personal interest courses were more often likely to be single, never married.

Carol Barnes (1987) conducted a preliminary survey of College Center for Older Learners (CCOLs), stimulating programs for older adults offered on college campuses designed without tests and grades which are offered as nondegree courses for the joy of learning. Requests for information were made to administrators of 92 programs drawn from a list developed by the Institute for Lifelong Learning. Fifty-six usable surveys from small and large institutions located in urban and rural settings were returned. Two of the purposes for this study were: (a) to draw a profile of older adult participants in college programs, and (b) to identify older adults who were not being served by CCOLs. Colleges were asked to report the number of adults 55 years and older served on an annual basis. Although these numbers were not reported, Barnes (1987) did detail the percentage of programs serving varying age group categories. This information is replicated in Table 2.

Of 26 CCOLs reporting income data, 27% served older adults with incomes less than \$5,000; 67% of the CCOLs served older adults with incomes in the range from \$5,000 to \$10,000; while 100% served older adults with incomes from \$10,000 to \$20,000. Only 21% of the CCOLs reporting income had participants with incomes over \$20,000. The marital statuses of married and widowed participants were equally represented at approximately 43% each. A very high percentage of CCOLs served participants who were retired (78%) of which most had completed high school (91%). Participants living alone slightly outnumbered participants living with a spouse (45% and 44%, respectively). Very few participants served were institutionalized (3%) or living

Table 2

*Percentages of Older Adult Programs by Age Ranges Served (N = 52)\**

| Age Ranges | Percent of Programs |
|------------|---------------------|
| 55-65      | 94                  |
| 66-74      | 100                 |
| 75-84      | 94                  |
| 85-90      | 71                  |
| 91+        | 43                  |

\*Some programs indicated data were kept on enrollments and not individual persons (Barnes, 1987, p. 4).

with relatives (8%). Many of the programs reported voluntarily that they did not reach minorities. Conclusions drawn about the profile of the older adult learner in CCOLs was that he or she is typically younger, better educated, retired, middle or high income individual in fair to good health. The nonparticipant profile characterizes people of low income and educational levels, in poor or frail health who lack transportation. The CCOLs responding to an open-ended question about nonparticipants often felt the underserved older adult was less comfortable in noncredit college programs for various reasons. But these program directors were quick to observe “if they (the less served) do enroll, most enjoy the experience” (Barnes, 1987, p. 13).

#### Motivational Studies in Adult Education

In one of the first studies testing Houle’s typology, Sheffield (1964) studied the motivational orientations of adults who attended educational conferences. The conferences were university conferences in one of four categories: liberal, occupational, functional, or recreational. Liberal education conferences provided basic knowledge in liberal arts mastery; occupational conferences provided professional or vocational training; functional conferences provided practical, nonvocational skills training; and recreational conferences were designed to aid knowledge and competency in the pursuit of an area of personal interest. Sheffield found similar orientations to Houle’s typology but noted that goal-oriented learning and activity-oriented learning could each be subdivided, thus five factor levels of orientation resulted:

1. Learning orientation - learning is for its own sake.
2. Sociability orientation - learning has a deep interpersonal or social meaning.

3. Personal-goal orientation - learning to solve problems or to pursue certain interests.
4. Societal-goal orientation - learning for clearly social or community-centered objectives not connected to course content.
5. Need-fulfillment orientation - circumstances of learning have personal meaning unrelated to course content or activity purposes.

In addition to the five orientations, Sheffield's study revealed conference type preferences according to learning orientation. The learning oriented learners were highly represented at functional conferences; the sociability oriented learners preferred recreational conferences; societal-goal oriented learners preferred liberal and recreational conferences; need-fulfillment oriented learners preferred occupational conferences; and personal-goal oriented learners were evenly distributed between all conference types with a slight preference for liberal conferences.

Building upon Sheffield's (1964) study, Boshier (1971) set out to test Houle's (1961) typology of motivational orientations in a New Zealand context. Using a randomly selected sample of adult education participants in a variety of nonvocational courses at three institutions—a high school evening institute, a university extension program, and a workers' education association—Boshier used the 48-item Education Participation Scale (EPS) that he developed for his study. In his study, Boshier identified 14 first order motivational orientations which he rotated additionally to reveal seven second-order and then four third-order orientations as follows:

1. Six of the first-order 14 were socially oriented (social welfare, social contact, social conformity, social sharing, improvement and escape, and interpersonal facilitation—factors 1, 2, 6, 10, 12, and 13, respectively).
2. Two of the original 14 factors were job or vocationally oriented motivations (other-directed and inner-directed professional advancement—factors 3 and 5, respectively).
3. Four of the original 14 factors loaded as education or learning oriented motivations (intellectual recreational, cognitive interest, educational compensation, and educational supplementation—factors 4, 8, 9, and 14, respectively).
4. Two remaining factors—factor 7 (educational preparedness) and factor 11 (television abhorrence)—loaded together due to the nature of the mathematical model used for factor loadings.

These factors compared to both Sheffield's and Houle's research. Factor one, social welfare, was deemed more specific than Sheffield's need-fulfillment orientation. Social contact (factor two) correlated well with Houle's activity orientation, and Sheffield's sociability-orientation. Factors three and five regarding other and inner-directed professional advancement correlated well with Sheffield's personal-goal orientation. Factor four (intellectual recreation) is similar to Houle's activity and Sheffield's need-activity orientations. Factor eight, cognitive interest, clearly identifies with Houle's learning for its own sake orientation. Factors four and eight are related according to Boshier with an intellectual recreation orientation with factor 4 arising from a deficit state

and factor 8, cognitive interest, arising from a growth state comparable to Maslow's (1970) self-actualizing person.

Morstain and Smart (1974) set out to replicate Boshier's (1971) study using adult education participants in the United States. In addition, Morstain and Smart (1974) looked at differences in learning by gender and age groupings. Three age groups were determined for each gender: 20 years or less, 21 to 40 years, and 41 years and older. These researchers were more interested in the degree of importance which adult education participants placed on each type of motivational orientation as measured by the EPS. For the entire study sample, Professional Advancement and Cognitive Interest were most important followed to a lesser extent by Social Welfare. The other motivational orientations, External Expectations, Social Relationships, and Escape/Stimulation, were of lower importance. By categories of group participation, Morstain and Smart (1974) found that increasing age was significantly correlated to decreasing importance for motivation on the Social Relationships scale (making friends and participating in group activity). For the Social Welfare scale (education for community service or humanitarian concerns), women tended to score lower with women 41 years and over having the lowest scores while men scored similarly for all age groups. Differences for Cognitive Interest, motivated by learning for its own sake, were significantly higher for women than men and the difference increased consistently with age along gender lines. Men overall in this study were motivated by External Expectations (seeking to fulfill requirements of others). Although Morstain and Smart's (1974) study verified Boshier's (1971) motivational orientations, they recommend that studies such as this one be conducted periodically to

test student motivations by certain factors over time as a means of gaining better understanding of characteristics and attitudes for program development.

Boshier (1977), building upon his 1971 data, attempted to build evidence for adult education participation motives classed into Maslow's (1962, 1970) deficiency or growth needs hierarchy. Boshier called the deficiency needs "life-chance" and correlated them with low socioeconomic status. He termed the growth needs "life-space" and attributed them to participation for expression rather than a need to cope or survive life situations. He correlated these with age and upper economic status. Boshier saw life-chance/life-space needs as a linear continuum and that a person's reasons for educational participation placed him or her at varying points along the scale based on increasing age, culture, and social situation. Boshier found foundation for the above correlations in two factors from Johnstone and Rivera's (1965) study that: (a) linked low socioeconomic status with the need to learn skills for coping with everyday life, and (b) linked older age with leisure-oriented learning. Unlike his 1971 study, Boshier's first factor analysis of these students in noncredit courses revealed only 13 of the original EPS factors, and it only took one more rotation to reduce these to five significant motivational orientations listed in descending order—Escape/Stimulation, Professional Advancement, Social Welfare, External Expectations, and Cognitive Interest. Comparing the data with findings from many studies conducted since Houle (1961) originally formulated his typology including Morstain and Smart (1974), Boshier (1971), and Sheffield (1964), Boshier (1977) concluded from these factor loadings that Escape/Stimulation, Professional Advancement, and External Expectation were life-chance motivations whereas Social Welfare and Cognitive Interest more clearly matched the growth oriented life-space

motivations. When Boshier evaluated the data along demographic and socioeconomic lines he found that younger, single cohorts were significantly more inclined to participate for Cognitive Interest motives while older, married adults were more likely motivated by External Expectations. Enrollment in high school or adult education courses within 2 years prior to the study were significantly correlated with motives for Social Welfare, Cognitive Interest, and External Expectations. Professional Advancement motives correlated highly with decreased formal education and low socioeconomic status while well-educated participants were more likely to respond to External Expectations as motives for learning. In addition, participants of the highest socioeconomic status were less motivated by Escape/Stimulation, External Expectations, and Cognitive Interest but more inclined to have Social Welfare motives. Women were more likely to be motivated for Escape/Stimulation, Social Welfare, and Cognitive Interest than men. Men were more likely to be motivated by Professional Advancement reasons. Although this study confirmed correlations of age and socioeconomic status found in previous studies, Boshier concluded that an association between the EPS factors, age, and socioeconomic status and the psychological foundations for self-actualization (growth) and basic (deficiency) needs were not possible on the basis of the data in his study or studies to date.

In 1971, Burgess studied 1,046 part-time adult education participants of a group activity in the metropolitan St. Louis area. Students from 54 different courses in the study used the Reasons for Educational Participation (REP) instrument which he developed for his study. Burgess' (1971) intent was to further explore Houle's (1961) motivational orientations. The typical participant in Burgess' (1971) study was similar to those in the



Johnstone and Rivera (1965) national study in that men and women each comprised approximately half of the group, had completed more years of schooling than the average adult, were younger than the total population, and had higher than average income levels. The participants were generally married persons employed in white collar jobs. Burgess (1971) factored his REP and found an interpretable and logical 15 factor solution of which seven factors emerged and were named upon the basis of meaning of the reasons as correlated by the factor analysis. The seven factors were named: The Desire to Know, The Desire to Reach a Personal Goal, The Desire to Reach a Social Goal, The Desire to Reach a Religious Goal, The Desire to Take Part in a Social Activity, The Desire to Escape, and The Desire to Comply With Formal Requirements. Burgess (1971) concluded that his survey supported and expanded Houle's (1961) three-factor typology and Sheffield's (1964) five-factor orientations by identifying two new orientations: (a) The Desire to Comply with Formal Requirements and (b) The Desire to Reach a Religious Goal.

In 1985, Boshier and Collins reported data reviewed from 13,442 learners collected from 54 studies done over a 22 year period after the origin of Houle's (1961) typology on four continents. All of the studies utilized some form of the EPS. Responses to the EPS and demographic data were recorded for cluster analysis to determine if EPS clusters fit the Houle (1961) typology and, if so, how well since the studies all found two to seven factors of motivation when factor analyzed. Results of the cluster analysis revealed that the three learning orientations identified in Houle's (1961) original sample of 22 interviewees were loosely formed as he had identified them. Cluster I—Cognitive Interest was consistent with the learning orientation; Cluster II was congruent with the activity orientation, and Boshier's Cluster III closely resembled the goal orientation.

Boshier and Collins (1985), however, concluded that the activity orientation was clearly more complex than Houle envisioned. Cluster II contained all of the social aspects of learning motivations for participation and was composed of items previously labeled Social Contact, Social Stimulation, External Expectations, and Community Service. By comparing and contrasting items in Cluster II, Boshier and Collins (1985) concluded that it was best to keep these factors separate since distinctions between items were well differentiated and easily understood. Boshier and Collins (1985) recommended further study in a variety of adult settings as well as investigating how orientations change as learners progress through educational programs, at the onset of major life transitions, and/or varying stages in the life cycle. They further suggested that subsequent studies use a standardized measuring scale such as the EPS and discontinue the practice of developing new scales and seeking additional orientations.

Life transitions is another reason cited as motivations for adult learning (Aslanian & Brickell, 1980; Merriam & Caffarella, 1999). These life transitions correlate well with Cross' model mentioned earlier. The transitioning triggers were divided into categories of family, career, health, religion, citizenship, art, and leisure. In this study, learners were typically under age 40, well-educated beyond high school, employed with high incomes, engaged in professional or technical work, and never married, or divorced. Widowed persons were less likely to participate. No gender differences were noted between the groups of learners. Changes in career followed by changes within the family (56% and 36%, respectively) ranked first as the triggers most likely to precipitate learning. Life changes, which included life transitions and triggering events, were cited as the key reason for learning by 87% of male learners and 79% of female learners. Professionals

cited life transitions as reasons for learning 86% of the time. Other groups of learners chose life transitions from a high of 89% for managers and officials to a low of 73% for laborers and farm workers. In addition, career changes were cited as a motivation for learning by 70% of the professionals in this study. Nonprofessionals cited career changes from a low of 47% for operators to a high of 88% for farm workers. In fact, only farm workers and manger/officials cited career changes more frequently than professionals

#### Motivational Orientations of Older Learners

For nearly all of the first decade or so following the introduction of Houle's (1961) typology, research into motivational orientations was focused almost entirely on adult education participation in general. In the 1970s, the focus shifted to older adults.

In 1975, interest in the learning orientations of the older adult piqued the interests of researchers. Heisel, Darkenwald, and Anderson (1975) used a national data base from the National Center for Education Statistics to examine the participation behavior and motives of persons aged 60 and over. They further divided the group studied into three categories: ages 60-64 (47% of sample), ages 65-69 (30% of sample), and ages 70 and over (23% of sample). Although participation dropped with advancing age, there were as many learners 65 and over as there were among those aged 60-64. Heisel et al. (1975) found that even when considering the fact that gender ratios prefer women, women participated in education more frequently than men. Although educational attainment had some effect on levels of participation (those with college degrees and those with high school degrees participated the most), educational attainment had more effect on the types of courses selected for study. Persons with high school degrees or less were equally likely to participate as those persons with some college background. Of the original 510 older

adults in the sample, 67 (43% males and 57% female) were engaged in learning in professional courses. Blacks participated at a rate of only 3.9%. Persons aged 60-64 years preferred technical/vocational, professional, safety, and for-credit courses (high school or college credit). Hobbies was the single most preferred type of course; however, civic and community courses were preferred by the older age groups. Forty-four percent said that they took courses for reasons of personal interest. By age groups, those aged 60-64 took courses because of a current job, while the 70 and over age group cited social or recreational reasons. While women overwhelmingly chose personal interest reasons for the courses they took, men's reasons were equally divided between personal interest and their current job. Personal interest as a motivating factor in participation became less important with increased educational attainment (chosen 53% of the time by those with less than a high school education, 48% high school completion only, 43% some college education, and 32% college degrees). Job advancement was the strongest motivator for those with a college degree. Reasons for participation by income correlated along the same lines as educational attainment: higher incomers participated for job-related reasons whereas lower incomers were more interested in courses for personal interest. Heisel et al. (1975) noted the need to expand programs to the less educated, less affluent, disadvantaged, and underserved elderly, many of whom live in rural areas and urban ghettos.

Boshier and Riddell (1978) published research on 84 older adults with an average age of 69.7 years who were observed to have eyesight and hearing problems. These older adults were enrolled in classes using motor skills, such as arts and crafts (40%), verbal skills (28%), liberal arts (18%), or classes teaching aging adjustment skills (14%).

Because all of the participants were retired, Boshier and Riddell (1978) utilized a short form of the EPS which deleted all job-related reasons from the scale. The purpose of their study was to examine factor structure to determine its stability with a retired population. The first factoring produced 11 factors which were further factored into a three-, four-, and five-factor solution. Boshier and Riddell (1978) decided the four-factor solution best suited the purposes of their investigation. These factors were Escape/Stimulation, Social Welfare, Social Contact, and Cognitive Interest. All of the reasons that loaded under External Expectations in previous studies loaded under Escape/Stimulation in this investigation. Concurrent validity of the EPS factors were correlated against the Life Satisfaction Index (Form A) developed by Neugarten, Havighurst, and Tobin, the Adjustment to Later Life Scale developed by Kurtz and Wolk, and a Social Participation Scale adapted from several instruments (as cited by Boshier & Riddell, 1978). When the EPS factor scores were correlated with scores from the other three instruments, Escape/Stimulation was the most strongly associated factor. Participants who showed this factor as their motivational orientation had significantly lower levels of social participation within the community. These participants were also less satisfied with their lives and more poorly adjusted to later life developmental tasks. It should be noted here that Escape/stimulation was the least powerful motivator for this group of older adults. Participants motivated by the Social Welfare orientation had significantly higher levels of social activity and better adjustment to late life developmental tasks. Social Welfare is a life-space (growth) motivation. Cognitive Interest, another life-space motivation, was the most powerful motivational orientation among the 84 persons surveyed. These participants also showed high levels of social

participation but adult education for this group was only one area of expression for an actively participatory lifestyle. Boshier and Riddell (1978) felt that these older adults were probably self-actualized (Maslow, 1970). Boshier and Riddell (1978) concluded that the EPS is an effective tool for measuring older adult motivational orientations.

Along a similar vein, Bynum, Cooper, and Acuff (1978) studied seniors at Oscar Rose Junior College enrolled in the Senior Adult Educational Programs. Three hundred twenty-seven students all aged 65 years or older responded to surveys distributed either in class or by mail. Although the function of the study was curriculum development, tolerance by younger students (age 30 and younger), the interaction between the groups, and mass media promotions to future senior participants, the demographic and descriptive data of the senior students are noteworthy. Noticeably more women than men participated in the program. The overwhelming majority of the participants were married (55%) followed by persons widowed (38%). Ninety-eight percent of the participants were White with above-average income and had more education (11.7 years) than the population of the surrounding city (9.3 years). Less than 2% of the older student population were Blacks-African Americans. Protestants outnumbered Catholics by a ratio of 9:1. A majority of the students lived in their own homes and drove automobiles (90% and 91%, respectively). Nearly 83% rated their overall health as average, adequate, or better. Among the benefits of participation, respondents listed the development of new skills (55%), finding new friends (73%), assistance with making decisions (23%), and the development of new plans for the future (45%).

In another early study of motivational orientations, Prichard (1979) used the EPS (Boshier, 1971) and a scale he developed, the Older Learners Participation Scale (OLPS)

to survey participants of the Educational Growth Opportunities Program at San Diego State University. Although the age range of respondents was 55 to 85 years, a majority (71%) were between the ages of 60 and 74 years. Only 6% were 80 years old or over. Like the previous studies, the majority of the population were women (79%), White (98%), and well-educated. Ninety two percent of those surveyed were high school graduates and 36% had college degrees. There were no Blacks (African Americans) represented in the sample and only four Asian-Americans and one Hispanic. Married and widowed persons were well represented (41% and 35%, respectively), whereas 13% were divorced and 8% were single. Women listed their preretirement careers as professional (a large group of retired teachers), clerical, and housewife. Of the men, 61% were listed as former professionals. Overall, 43% of the sample listed professional occupations, 11% listed sales occupation, and there were very few blue collar occupations represented. The male respondents had high incomes (22%) while only 6% of the women reported high income status. There were no males in the lowest income bracket, but 3% of the females had very low income. Six motivational orientations were identified as a result of this study: (a) Escape/Stimulation (least influential), (b) Social Contribution, (c) Self-Actualization, (d) Socialization/Stimulation, (e) Cognitive Interest (most influential), and (f) Adaptation/Self-Understanding.

Although Pritchard (1979) identified six separate orientations, he noted that participants were usually moved to studying for a combination of motives rather than a single orientation. Females in his study were motivated most by Socialization and Cognitive Interest. Those with the least education were also highly motivated by Cognitive Interest as were those formerly employed in administrative, sales, and clerical

jobs. Socialization was an important motive for those who did not consider themselves to be retired. Adaptation/Self-understanding was important to half of the respondents.

Pritchard (1979) recommended further study in the area of sociodemographic trends and their influence on motivational orientations.

In order to determine the differences among older adults studying among their peers (age-segregated, 62 years and older) and those studying in groups of varying ages (age-integrated), Sprouse (1981) used Boshier's (1971) EPS to study the learning orientations of older learners. Of the age-segregated learners, the group could be equally divided by age, 62 to 70 years old and 71-79 years old. Urban learners were younger generally and rural learners were represented more in the 71 to 79 age group. The age integrated learners were better educated (71% had postgraduate learning) and were younger, 62% were age 62 to 70. In both groups, participation declined with advancing age as noted in other studies. Seventy-six percent of the learners studied had completed high school, although two stated that they had no formal schooling at all. The average educational attainment of participants was 13.3 years. Prior educational participation was strongly associated with current and future participation. Urban age-segregated learners participated more frequently than rural age-segregated learners. Age-integrated learners had the highest participation rates. Of the six motivational orientations identified by Boshier (1971), only four (Escape/Stimulation, Social Welfare, Social Contact, and Cognitive Interest) were identified. The strongest orientation for age-segregated learners was Social Contact. Social Contact had an inverse relationship for the age-integrated learner. Cognitive Interest was the most important factor for the age-integrated.



In 1981, Peterson's study of 88 retired persons participating in a seven-session lecture-discussion program was conducted to determine the relative importance of motivational variables. In his study group, the average age of the participant was 69.5 years. Sixty eight of the 88 persons surveyed were women, 34 were married, 27 were widowed, and 26 were single, divorced, or separated. Peterson found above average educational levels (14 years) and higher incomes than the general older population. In addition, this study found two motives of equally primary importance to respondents: (a) interest in program content and (b) sponsorship and quality of the lecture-discussion. The third most important reason for participation was social in nature (interaction with or knowledge of other participants, group acceptance, and making new friends). Relationship with the program sponsor was ranked as the least important reason for participation.

Another study from the early 1980s (Fisher, 1983) attempted to characterize older adult participants in education and to identify motives for participation. The average age of the 786 active older adults from eight gathering places for seniors in Milwaukee County, Wisconsin, was 73.6 years with the maximum of participants in the age range between 55 to 74 years. Additional age group demographics showed that 21% were aged 55 to 64 and 26% were aged 75 and above. Females, as in similar studies, represented a majority (78%). Fifty percent of those surveyed had high occupational status, and 39% were married. Fisher found significant relationships in educational levels (above 12<sup>th</sup> grade) of 211 participants when compared to a matched group of 211 nonparticipants (below 12<sup>th</sup> grade). The matches were based on age, marital status, occupational status, and gender. Participants statistically scored lower on a self-to-others alienation scale and

higher on learning-related factors such as a propensity to engage in learning and to be aware of learning needs and locations of educational facilities to fulfill those needs.

Participants also scored slightly higher on life satisfaction scales but these scores were not statistically significant. The reasons given by participants for learning were: (a) being with other people (84%), (b) the challenge of learning (80%), and (c) useful subject matter (68%). A noteworthy finding of Fisher's (1983) study was that the participants were more aware of and listed more barriers to participation than the nonparticipants in the study samples.

### Learning Among the Professionals

While there remains a certain air of elusiveness to the definition of the terms "profession," "professional," and "professionalization," experts in the field of education all agree that the terms are unified in the attainment of a specialized body of abstract and specialized knowledge based on theory with practical application. In addition to specialized knowledge, most experts agree that this knowledge is linked to university training, a period of internship followed by a qualifying examination and licensure, certification, or registration. Once this evidence of competence has been obtained, the professionalized terms carry with them political or governmental legitimization, autonomy and self-regulation, associational membership, an aura of commitment to public service, ethical conduct, and often high social status (Cervero, 1988; Cervero, Azzaretto, & Associates, 1990; Eraut, 1994; Freidson, 1986; Houle, 1980; Jarvis, 1983; Larson, 1977; Watson, 2000; Wilensky, 1964).

From the time a student chooses a profession as a career path, he or she elects learning and education for a lifetime. This is not to say that other occupations do not

experience lifelong learning, but that the professional focuses every learning experience as a means of improving problem-solving skills in the practice of his or her chosen area of expertise (Cervero, 1988; Houle, 1980; Jarvis, 1983; Larson, 1977). The main thrust of this learning is to remain current as new knowledge enters the field and to maintain and enhance competence in the current or future position (Queeney, 2000). In the 1960s and 1970s individual professionals, government, and other regulatory agencies gave this learning the name *continuing professional education* (CPE) and began mandating educational requirements for licensure and certification to practice (Houle, 1980). This credentializing was deemed necessary for professional accountability to the public and, thus, lifelong learning became integrated into the professionals' daily practice as the practitioner moved from one project, patient, client, or task to another for problem-solving in a variety of specialized and technical areas of practice. Education and training set the stage for gaining knowledge about new research, technology, and/or procedures for the provision of services in their areas of specialty, especially in the fastest growing or most highly technical fields (Brown, 1990). The continuation of learning also ensured that the seasoned professional could compete at the same level of competency as newly-graduated practitioners.

One of the first studies to examine professionals' motivations for learning was conducted by Dickinson and Clark (1975) using Sheffield's (1964) Continuing Learning Orientations Index on a sample of 220 female registered nurses from a stratified random sample at five general hospitals in Vancouver, British Columbia. This investigation also used an instrument of learning activities to assess self-education (self-planned) and continuing (professional) education (planned by others) to determine which motivational

orientations were associated with each type of professional education. Dickinson and Clark (1975) hypothesized positive relationships for each of the orientations (goal, activity, and learning) as identified by Houle (1961) and each type of education (self-planned and continuing), but they felt a stronger positive relationship would exist in both types of education and the learning-oriented nurses. Nurses were asked to respond to the learning activities instrument based on all learning activities studied, not just nursing related education. The learning activities instrument contained 11 self-education and 11 continuing (professional) education activities. After a factor rotation, Dickinson and Clark (1975) obtained eight factors similar to those found by Sheffield (1964). The factors were as follows: (a) learning orientation (a single factor consistent with Houle's (1961) learning orientation, (b) occupational orientation, professional orientation, and societal orientation (three factors related to clear-cut goal-oriented learning, (c) sociability orientation, interactive orientation, and relief from boredom and frustration (three factors identified with activity-oriented learning), and (d) one factor that had no meaningful interpretation. As to the correlation between self-education/continuing (professional) education and noted motivational orientations, Dickinson and Clark (1975) observed that nurses participated more often in self-education but nurses with learning-oriented motivations chose both types of learning activities with equal frequency as hypothesized. Mixed results were obtained for other motivational orientations. The interactive (activity) orientation was positively correlated with both types of learning activities but the professional (goal) orientation was negatively associated with both types of learning activities. All other relationships were positive but not significantly so. Dickinson and

Clark (1975) concluded that the relationship between learning oriented motivation was similar regardless of the learning activity chosen for its fulfillment.

Another early study of continuing professional education (CPE) was conducted using Boshier's (1971) EPS modified to include eight additional reasons on a sample of 843 nurses enrolled in college and university programs in 24 states with either mandatory CPE, proposed legislation for mandatory CPE, or voluntary CPE. A majority of the participants in O'Connor's (1979) investigation were female (97%), married (67%), between the ages of 21 and 40 (63%), and employed full time in nursing at the time of the study. Seven meaningful factors emerged out of 13 when O'Connor analyzed her data: (a) compliance with authority, (b) improvement in social relationship (c) improvement in social welfare skills, (d) professional advancement, (e) professional knowledge, (f) relief from routine, and (g) acquisition of credentials. O'Connor (1979) concluded that the professional knowledge orientation was similar in meaning to Boshier's (1971) "Cognitive Interest" and Houle's (1961) "learning" orientation as identified in other studies. The appearance of the new motivational orientation, acquisition of credentials, correlated highly with both Professional Advancement and External Expectations as identified in other EPS studies. There was no relationship found between the presence, absence, or threat of mandatory CPE requirements on orientations or levels of participation in educational projects. The overriding motivation was for professional reasons (improve knowledge and skills and to serve mankind) indicating that these nurses were growth-motivated, self-actualizing learners.

Within the realm of professional education, Groteleuschen, Harnisch, and Kenny (1980) argued that since all CPE was goal-oriented ("purposive") (p. 3), scales intended

to measure a broad array of motivational orientations for learning had the potential of lacking precision and relevance for professional groups and felt that job context and life role circumstances should be incorporated into the measuring instrument for depth and relevancy. They developed the Participation Reasons Scale (PRS) to assess the more professionally specific “educational” reasons exceeding the activity itself and originally tested it on a sample of 404 professionals attending the Executive Development Center at the University of Illinois at Urbana. These professionals were divided into two groups for comparison by the type of course taken: the executive group and the finance group. The RPS measured motivation in four areas: (a) Collegial Learning/Interaction—desire to interact with other professionals and challenge intellectual abilities; (b) Personal Benefit/Job Security—increasing personal financial gain/benefits for family and friends, (c) Professional Improvement and Development—maintaining/improving knowledge, and (d) Professional Service—concern for better customer service by keeping abreast of new developments in a professional field. The finance group placed greater emphasis on professional service while the executive group felt Professional Improvement and Development was most important. Income correlated with several factors: low income correlated highly with Professional Service, middle income with Collegial Learning and Interaction. As income increased, Personal Benefits and Job Security declined; increased income was associated with high scores for Professional Improvement and Development. Using educational level as a grouping factor, Groteleuschen et al. (1980) found that Personal Benefit and Job Security was most important to persons with associate degrees followed closely by those with a high school education. Persons with doctorate degrees scored lowest for this factor.

In a similar study using a modified Judge Form of the PRS, Catlin (1982) investigated 399 trial court judges in Michigan to assess participation motivation independent of a specific CPE program or activity. A majority of the judges (57%) were over the age of 50, had been judges for only 10 years (59%), and had assumed their current position within the 10 years preceding the study (76%). A large majority (76%) of the judges served in courts with five judges or less. Only 4% of the judges were female, and 90% were married. Eighty percent of the judges had participated in a CPE activity or program at least three times in the preceding year. Using factor analysis, Catlin (1982) identified three distinct factor clusterings: Professional Perspective (to reinforce identity with profession), Judicial Competence (to maintain competence and develop new skills), and Collegial Interaction (interaction with and challenge of thinking by other judges for the exchange of ideas). The single most important reason for study by these judges was to stay abreast of new legal developments. Job Security and Job Advancement ranked relatively low overall, but 48% of the judges felt these reasons were moderately important. Recency of graduation from law school was positively correlated with the Professional Perspective factor. Judges who had been on the bench for shorter periods of time placed increased emphasis on reasons of Judicial Competence as did female judges. Catlin's (1982) findings suggest that judges' reasons for participation in CPE may be less dependent on program content alone. Although maintaining competence is related to content and is very important for judges, personal and professional characteristics influence participation motives as well.

In a more recent study, Scribner (1999) included motivational orientation as part of a study to examine professional learning and work context for teachers using their

perspective. The study was conducted using interviews with and observations of teachers with documents to compare and contrast emerging themes of the interview data. Principal and peer recommendations from three urban schools in one school district were utilized to obtain 45 secondary school teachers and seven school administrators for in-depth, semistructured, and open-ended interviews lasting 30 minutes to 2 hours. Only formal, school district reform agenda, and professional development learning experiences were examined. Careful examination of the data identified four intrinsic and two extrinsic reasons for learning (Morstain & Smart, 1974). The intrinsically motivated teachers learned to address (a) content learning needs, (b) pedagogical skill deficiencies, (c) challenges to classroom management, and (d) gaps in student-centered knowledge. Additional motives were mentioned to a lesser extent as a sense of moral obligation and personal interest. Extrinsic motivations were to obtain remuneration and to meet licensure requirements. Overall, these teachers were most motivated by content for increasing knowledge and skills in their current area of expertise or for broadening knowledge into other disciplines. Staying up-to-date out of a commitment to students and their profession was also important. Experienced teachers were desirous of extending the professional knowledge gleaned into usefulness for their personal lives. Career stage influenced extrinsic motivation for pay, in that less experienced teachers with lower salaries were more likely to participate for this reason. Licensing requirements were equal motivators across all three schools.

Childers (1993) studied the reasons for participation in CPE of a group of members within an unspecified employment and training occupation looking for factor(s) to explain the participation reasons of a professionalizing occupation. The investigation



surveyed 229 respondents, 43 of which were State Division level members of the Missouri State Division of Job Development and Training; the remaining professionals were employed on the Service Delivery Area Level. The surveying instruments were the PRS (Groteleuschen et al., 1980), Hall's Professionalization Scales (as cited by Childers, 1993), and a demographic questionnaire developed for Childers' (1993) study.

Respondent characteristics can be described as 58% female; 52% had a college degree. An additional 21% had some graduate college work while 1% had graduate degrees. A majority of respondents (46%) belonged to a professional association. The range in age of the professionals was 21 to 70 years; however, only 6.2% were 50 or more years old. The professionals were subdivided by the position held: administrators, managers, and line staff (28%, 34%, and 37%, respectively). The professionals in this investigation ranked Professional Improvement and Development as the most powerful motivational influence followed in descending rank order by Collegial Learning and Interaction, and administrators were more likely to cite these two reasons than were line staff. Managers reported the highest means for all learning motivations except Professional Improvement and Development. Line staff professionals had the lowest means for all learning motivations except Professional Service. Both administrators and managers and females were significantly different in their motivation for Professional Improvement and Development, and Collegial Learning and Interaction than line staff professionals. Line staff professionals and males were not as likely to be motivated for these reasons. Females also showed significantly higher scores on Professional Service motivational reasons. Childers (1993) concluded that professional motivations for learning are complex and may reflect employment role which warrants further study.

Groteleuschen, Kenny, and Harnisch along with Cervero continued to collect data on motivational orientation using the RPS and in 1981 compiled a comparative analysis of five studies on five professional groups: 211 veterinarians in Illinois, 400 judges in Michigan, 242 physicians from five hospitals in the Chicago area, 136 business professionals in the Executive Development Program at the University of Illinois Urbana-Champaign, and 277 nurses from North Carolina. Five groups of reasons from the PRS (Groteleuschen et al., 1979) were named within these five studies: (a) Professional Improvement and Development, (b) Professional Commitment, (c) Personal Benefit and Job Security, (d) Professional Service, and (e) Collegial Learning and Interaction. One of the purposes was to identify differences which exist among as well as within professional groups. Both business executives and nurses scored highly on the Personal Benefit and Job Security cluster of reasons, judges and veterinarians had low scores while physicians were moderately located on this cluster. Within the five professional groups, the only personal (demographic) characteristic associated with the reasons for participation was age. As far as the extent to which age affected reasons for participation, professional groups were found to be quite similar with the exception of physicians. In all five professional groups advancing age was associated with reduced extent of participation and with reduced participation for the reasons Professional Improvement and Development, Professional Commitment, and Personal Benefit and Job Security. With the exception of judges and physicians age as an indication of participation peaked in middle adulthood and significantly declined thereafter. Physicians and judges' participation activity peaked at the beginning of their careers and declined thereafter.

Physicians showed fairly stable levels of participation after middle adulthood whereas judges increased their decline in participation dramatically after middle adulthood.

#### Learning in the Institute for Learning in Retirement (ILR) Program

The Institute for Learning in Retirement (ILR) originated in response to older learners' desire for late-life learning. It began as part of two movements that developed separately. In 1962, a group of retired teachers in New York City approached the New School for Social Research in Greenwich Village to design a program for retired and semi-retired persons desiring intellectual stimulation and new interests. This led to the formation of a self-governed, peer-taught program called the Institute of Retired Professionals (IRP). By 1985, the IRP had expanded to nearly 50 programs mainly on the east and west coasts of the United States. Meanwhile, Elderhostel began developing travel oriented education programs on college campuses during summer months filling empty dorm rooms and providing learning opportunities to older adults. Although Elderhostel did not start until 1975, within 5 years it had expanded to all 50 states. In 1997, Elderhostel's president, Bill Berkeley, became aware of the Institutes and linked with Kenneth Young, director of the American University ILR, to identify commonalities of ILR programs and develop alternative models which could be adapted by older adults, colleges, and universities for program expansions. With Elderhostel taking the lead they advanced a "new and exciting educational movement for older adults" (History of the Elderhostel Institute Network, 2005; About the IRP, 2005) (p. 2). In 1988, the Elderhostel Institute Network (EIN) was formed to help spread the word about ILR and assist in the development of new campus-based Institute programs. Each ILR program is unique as it reflects its membership's needs and interests. Institutional sponsorship, membership

input, and leadership provide a wealth of resources for continued learning opportunities among older adults (Garofolo, 1995). Educational activities are flexible and courses are offered in a variety of formats. Because there are no formal requirements other than membership and course fees (i.e., no tests or for-credit courses), the environment is both learner-friendly and learner-responsive.

Although ILRs have been in existence since 1962, relatively few studies have been conducted on these programs. Bynum and Seaman (1993) reported one of the earlier studies to identify and understand 452 ILR participants' motivations. All of the participants were taken from six ILR programs in four southeastern states and were surveyed using the Reasons for Participation Scale developed by Furst and Steele (as cited by Prichard, 1979) to measure motivational orientation in for-credit university courses. The form was modified to eliminate reasons related to earning a college degree and to modify group activity to group identity. The demographic profile of Bynum and Seaman's (1993) ILR respondents were White (99%), between the ages of 65 and 74 years, female (61%), and married (66%). Bynum and Seaman (1993) also reported a large number of migrant retirees (lived in area less than 5 years) in this study (40%). Above average health, economic status, and formal education were also reported. Seventy-one percent were college graduates or post-college graduates. A principal components analysis was used to identify four basic motivations: (a) self-actualization—compares to Maslow's (1970) growth-oriented and Houle's (1961) learning for its own sake; (b) perceived educational gaps—completing unfinished learning and developing talents; (c) intellectual curiosity—an intrinsic interest in the subject for intellectual stimulation; and (d) social contact—maintain social relationships and/or facilitate the replacement of lost

relationships. Intellectual curiosity was the strongest motivator for this group. Social contact and perceived cognitive gaps equally served as the second most powerful motivator. Bynum and Seaman (1993) concluded that ILR participants as a group are more cohesive in their learning orientations being strongly moved by an intellectual, self-actualizing factor. These researchers recommended further research using open-ended questions as well as similar studies in other geographic regions.

Garofolo (1995) investigated the relationship of life satisfaction and motivations among ILR participants in 12 programs in the Great Lakes region of the United States. Garofolo (1995) obtained responses from 573 ILR participants. The EPS (A-Form) developed by Boshier (1991) was used to measure motivational orientations. Self-report data were also gathered on a sociodemographic questionnaire developed by Garofolo and the Life Satisfaction Index developed by Neugarten and associates in 1961 (as cited by Garofolo, 1995). The majority of participants in this investigation were female (58%), married (56%), equally likely to be living with a spouse or alone, had monthly incomes over \$1,200 (86%), unemployed (80%), and had at least some college education (89%) with 33% reporting graduate degrees. Forty-three percent of those responding to this survey had been members of ILR for a period of one to 3 years. The typical ILR participant in the Great Lakes region was atypically highly educated compared to the general population. The most influential reason for participation by this group was a commitment to cognitive stimulation (joy of learning) followed by social interaction. The least influential reasons were preparation for additional schooling or job preparation for professional advancement. Gender significantly correlated with both of the leading motivations for participation in that females were more likely to score high on Family

Togetherness and Social Contact factors. Social Stimulation and Communication Improvement were correlated positively with income. She also found significance between motive, educational level, and length of ILR affiliation. Garofolo (1995) neglected to indicate which income level, educational level, and length of affiliation were associated with this. An atypical learner was found in the Great Lakes region of the United States with strong yearnings to fulfill Cognitive Interest and Social Contact and little interest in Job Preparation or Professional Advancement. Garofolo concluded that older adults are different from their younger counterparts as identified by Boshier (1991) which indicates a strong influence for Professional Advancement and Educational Preparation. Garofolo concluded this was a life stage finding based on societal role expectations. She further recommended additional similar studies in order to determine a national profile of ILR participants and to verify the findings to establish a stronger database of older adult learners.

A 1998 study conducted by Russett looked at learning projects and motivational factors of ILR participants. Russett (1988) utilized Boshier's EPS A Form (1991) to measure motivation and Tough's *Interview Schedule for Studying Some Basic Characteristics of Learning Projects* (as cited by Russett, 1998). Russett (1998) used an oral presentation to get volunteers to complete the EPS or mailed the EPS with instructions for it to be picked up at the time of a scheduled interview. Ninety ILR participants were interviewed with an age range of 55 to 89 years at an ILR program in Mississippi with an average age of 68.8 years. The typical participant was female (72%), with a mean preretirement income of approximately \$61,000 per annum, and had a college degree or higher (76%). All seven factors of the EPS were identified, but

Cognitive Interest was the most powerful motivational orientation followed by Social Contact. The least powerful motivator was demonstrated to be Professional Advancement. Russett determined that participants took on an average of 8.7 learning projects (range from one to 18 projects per person) with an average of 3.3 projects undertaken under the ILR format. Approximately 7 hours were needed to complete projects with a range of 110 hours for ILR projects and a mean of 40.1 hours to complete ILR projects. With respect to multivariate analysis, only motivation had the most significant predictive power in explaining participation in learning projects. Educational Attainment also had a moderate predictive power (6%). Russett's (1998) findings of a mostly female, affluent, well-educated older learner is consistent with previous studies. Cognitive Interest was the most powerful motivational orientation followed by Social Contact. Russett (1998) concluded that these interests fit Houle's (1961) learner- and activity-oriented groups and concluded that older learners want to go beyond the current offerings of ILR to meet some of their learning needs. She also concluded that her participants were a demographically elite learning group and does not address learners with varying responsibilities, income levels, or other restraints and barriers to participation. Russett (1998) recommended further research based on variables of motivation, age, socioeconomic status, gender, and educational attainment using the EPS scale.

In a more recent similar study, Kim and Merriam (2004) studied motivations of 189 older learners in a southeastern United States university town ILR program using the EPS A Form (Boshier, 1991) modified to exclude the motivational factors Communication Improvement, Professional Advancement, and Educational Preparation.

The typical profile of Kim and Merriam's (2004) ILR participant was married (63%), well-educated (79% were college graduates or higher with 54% having attended graduate or professional school), and female (68%). Respondents in the 61-70 and 71-80 age category were highly represented (47% and 40%, respectively). Those 50-60 years of age and over 80 years each represented 6.3% of the ILR participants surveyed. Eighty-nine percent of the responders were retired, 2% were still working full-time while the remaining 9% worked part-time. Most of the participants had lived in the area over 10 years (75%). The highest motivating factor for this group was Cognitive Interest with Social Contact as the second most important motivator. Family Togetherness was the least motivating factor and Social Stimulation also was shown to have limited motivating experience. Of the personal characteristics studied, only educational level, years of residence in the state, and marital status were predictive. The greater the educational level the less likely Social Stimulation appeared as a motivating factor. The longer the participant had lived in the area, the less likely he or she was to participate for Social Contact. Married participants were more motivated by Family Togetherness and less motivated by Social Contact. Age, gender, and employment status showed no significant relationship to reason for ILR participation. Kim and Merriam (2004) concluded that ILRs hold a particular attraction for professionals and that more education enables older adults to participate in various activities. Kim and Merriam (2004) suggest additional study in other settings to assess diversity, longitudinal studies to assess persistence in education, and comparative studies to find differences for the expansion of knowledge and understanding of adult education in general.



## Summary

The basis of modern motivational research in adult education is Houle's (1961) three-part typology of goal-, activity-, and learning-oriented reasons for study. The researchers of reasons for participation have identified up to seven factors (depending on the researcher's interpretation) that extend the three original categories. Several researchers developed instruments to measure motives for learning, but by 1985 Boshier and Collins suggested that attempts to develop new scales and additional reasons be discontinued and that a standardized scale be adopted. Since that time, the Education Participation Scale (EPS) has been used. Table 3 summarizes motivational orientations using the EPS as well as some of the early studies using different scales. Studies of professionals' reasons for participation in educational activity list only goal-orientations where all learning leads to an improvement of practice related to problem-solving skills. For the older adult, life transitions (e.g., retirement, loss of a spouse or friends, changes in income and living arrangements, etc.) provide motivation for continued learning. Education and learning are viewed as a means to overcome a state of deprivation (deficit motivation) or to provide fulfillment to attain one's potential (growth motivation) (Maslow, 1962, 1970, 1971). Several researchers have associated growth motivation to advancing age (Bynum, Cooper, & Acuff, 1978; Morstain & Smart, 1974; Prichard, 1979; Sprouse, 1981). High socioeconomic status and educational attainment (such as that seen among professionals) is viewed to correlate with growth motivation and increased educational activity (Boshier, 1971; Burgess, 1971; Bynum, Cooper, & Acuff, 1978; Creighton & Hudson, 2002; Heisel, Darkenwald, & Anderson, 1975; Johnstone & Rivera, 1965; Kim & Merriam, 2004; Merriam & Caffarella, 1999).

Table 3

*Summary of Factors Identified in Studies of Learning Orientation Based on Houle's (1961) Typology*

| Houle's Typology  |  |  |                                 |
|---|--|--|---------------------------------|
| Study   | Goal Orientation   | Activity Orientation   | Learning Orientation            |
| General Adult Education<br>Sheffield (1964)                       | Personal-goal<br>Societal-goal   | Need Fulfillment<br>Sociability  | Learning                        |
| Boshier (1971)*   | Professional Advancement<br>Other-directed Advancement                       | Social Welfare<br>Social Contact<br>Intellectual Recreation                        | Cognitive Interest              |
| Morstain & Smart (1974)*  | Professional Advancement<br>External Expectations                            | Social Relationships <sup>1</sup><br>Escape/Stimulation<br>Social Welfare          | Cognitive Interest <sup>1</sup> |
| Boshier (1977)*   | Professional Advancement<br>External Expectations                            | Escape/Stimulation <sup>2</sup><br>Social Welfare                                  | Cognitive Interest <sup>2</sup> |
| Burgess (1971)  | Personal-goal<br>Societal-goal<br>Religious-goal<br>Meet Formal Requirements | Social Activity<br>Escape  | Desire to Know                  |
| Boshier & Collins (1985)*   | Professional Advancement   | Social Contact<br>Social Stimulation<br>External Expectations<br>Community Service | Cognitive Interest              |
| Older Adult Education<br>Heisel, Darkenwald, & Anderson<br>(1975) | Professional Interest<br>Hobbies   | Civic/Community Service <sup>1</sup><br>Social/Recreation <sup>1</sup>             | Personal Interest <sup>2</sup>  |

Table 3 - Continued

| Study  | Goal Orientation                                      | Activity Orientation   | Learning Orientation   |
|--|---|--|--|
| Bynum, Cooper, & Acuff (1978)                        | New Skill Development<br>Future Planning Skills       | Finding New Friends  | Decision-making Skills   |
| Prichard (1979)*                                     |   | Escape/Stimulation<br>Social Contribution<br>Socialization/Stimulation                             | Self-actualization<br>Cognitive/Interest <sup>1</sup><br>Adaptation/Self-understanding |
| Sprouse (1981)*                                      |   | Escape/Stimulation<br>Social Welfare<br>Social Contact <sup>1</sup>                                | Cognitive Interest   |
| Peterson (1981)                                      | Program Content                                       | Sponsorship Quality<br>Social Interaction  |  |
| Fisher (1983)  | Useful Subject Matter                                 | Being with Others  | Challenge of Learning  |
| Studies of Professionals<br>Dickinson & Clark (1979) | Occupational<br>Professional<br>Societal              | Sociability<br>Interactive<br>Relief from Boredom/Frustration                                      | Learning   |
| O'Connor (1979)*                                     | Professional Advancement<br>Credential Acquisition    | Compliance with Authority<br>Social Relations Improvement<br>Social Welfare<br>Relief from Routine | Professional Knowledge   |
| Institute Studies<br>Garofolo (1995)*                | Professional Advancement<br>Communication Improvement | Social Interaction<br>Family Togetherness<br>Social Contact <sup>1</sup><br>Social Stimulation     | Cognitive Interest <sup>1</sup>  |
| Russett (1998)*                                      | Professional Advancement<br>Communication Improvement | Social Contact <sup>1</sup><br>Social Stimulation<br>Family Togetherness<br>Social Interaction     | Cognitive Interest <sup>1</sup>  |

Table 3 - Continued

| Study                | Goal Orientation | Activity Orientation   | Learning Orientation            |
|----------------------|------------------|--|---------------------------------|
| Kim & Merriam (2004) |                  | Social Contact <sup>2</sup><br>Family Togetherness<br>Social Stimulation | Cognitive Interest <sup>1</sup> |

\*Education Participation Scale Survey

<sup>1</sup>Significant with Advancing Age

<sup>2</sup>Associated with Low Economic Status and Deficit Motivation

National studies of who participates in formal adult education consistently demonstrated that the higher the educational level of the participant, the more likely he or she is to engage in learning activity. The learning activity rates for older adults have shown a consistent rise from a low of 6% (for those over age 45) in 1965 (Johnstone & Rivera, 1965) to over 34% for those aged 60 to 64 (U.S. Department of Education, 1999). The aged are more likely to study for Cognitive Interest and Social Contact (Boshier & Ridell, 1978; Fisher, 1983; Kim & Merriam, 2004; Prichard, 1979; Russett, 1998). Professional and white collar workers continuously demonstrate higher rates of participation.

The typical adult learner since 1978 is a female, White, well-educated, under 40 years old, married, mid- to upper-income with continuing professional education requirements (Bynum, Cooper, & Acuff, 1978; Kim, Collins-Hagedon, Williamson, & Chapman, 2004; Merriam & Caffarella, 1999). The typical older adult learner profile is similarly White, young-old, well-educated, mid- to upper-income, married, and interested in personal interest courses (Barnes, 1987; Bynum, Cooper, & Acuff, 1978; Fisher, 1983; Peterson, 1981; Prichard, 1979; Sprouse, 1981). The profile of the ILR participant is a retired, White, 66 to 70 year old, married, well-educated, high income individual who is healthy and motivated by intellectual curiosity and social interaction (Bynum & Seaman, 1993; Garofolo, 1995; Kim & Merriam, 2004; Russett, 1998). In addition, Garofolo (1995) linked income with learning for Communication Improvement. Garofolo also found ILR participants likely to engage in educational activity outside of ILR to fulfill the majority of their learning needs. However, Kim and Merriam (2004) concluded that ILR holds a particular attraction for professional retired learners. Studies with professionals as

a grouping variable in later adulthood are lacking. Groteleuschen, Kenny, Harnisch, and Cervero (1981) linked advancing age with reduced educational activity in the professional and for the reason, Professional Improvement and Development.

## CHAPTER III

### METHODOLOGY

#### Overview

This study was a descriptive, causal-comparative, qualitative measure of the effect of professional status and nonprofessional status on motivations for learning within the Institute for Learning in Retirement (ILR) programs at two south Mississippi institutions. Professional participants were compared with nonprofessional participants to determine differences in learning orientations. Where sufficient numbers existed, correlations between gender, race, age, marital status, socioeconomic status, and employment status were assessed. In addition, members of a rural ILR program were compared to members of an urban ILR program.

#### Research Design

A one time observational, cross-sectional assessment of variables was collected. Independent variables were age, defined as young-old (50-64 years), middle-old, (65-74), and old-old (>75 years), gender, socioeconomic status, employment status, rural or urban, and professional and nonprofessional status. Professional status was defined as an ILR participant who had (a) 4 years of formal education beyond high school and/or an internship or preservice training program, and (b) certification or licensure requirements meeting state or association criteria. ILR participants not meeting these two criteria were considered nonprofessionals.

Race was defined as Black or African American, White, and other.

Socioeconomic status was grouped into lower (<\$15,000 annual income), middle (\$15,000-\$40,000 annual income), and upper (>\$40,000 annual income) class. Rural

dwellers were members of the ILR at Southwest Mississippi Community College (SMCC) in Summit, Mississippi, and urban dwellers were ILR participants of the Osher Lifelong Learning Institute (OLLI) at The University of Southern Mississippi (USM) in Hattiesburg, Mississippi. Marital status was defined as married, widowed, divorced or separated, single, and other to allow the possibility of elders sharing living quarters to maintain Social Security benefits. Employment status was defined as full time, part time, self-employed, retired, or volunteer. Dependent variables were the motivational orientations defined by the following seven factors as measured by the Education Participation Scale (EPS):

1. Social Contact - motivated to learn with others
2. Social Stimulation - motivated to escape loneliness and boredom
3. Professional Development - motivated to enhance current or future job skills
4. Community Service - motivated to “do good” in civil society
5. External Expectations - motivated due to pressure at home or work
6. Cognitive Interest - motivated to learn for learning’s “own sake”
7. Communication Improvement - expansion of verbal or written language skills

Three open-ended questions allowed qualitative evaluation of possible motives not covered by the EPS and advertising or marketing strategies of each ILR program.



## Participants

A sample size of at least 30 is recommended for causal-comparative studies (Gay & Firasian, 2000). One hundred fifty ILR members from SMCC ILR and Osher Lifelong Learning Institute (OLLI) members from USM were chosen for this study. All participants were 50 years of age or older and were from middle- or upper-class socioeconomic status. Some of the participants were nonprofessionals.

A roster of course offerings was obtained from both ILR programs. Six intact groups of approximately 10 students each were selected by matching course titles. Course titles were the categories of (a) money/investing, (b) computer usage, (c) art, (d) history, (e) driver safety, and (f) destination field trip. Participants were recruited face-to-face by the researcher who attended one or more class sessions and recruited volunteers for the study. This sample was intended to represent members of the ILR programs at SMCC-ILR and OLLI-USM.

## Instrumentation

Demographic data were collected using the form shown in Appendix B. This form assessed age, gender, race, marital status, employment status, income status, educational level, location of ILR program, personalized motives for taking the specific course, joining ILR, mode of introduction to ILR, and professional status.

The qualitative section of the demographic data form (Appendix B) had two open-ended questions to obtain additional motivations for joining the ILR program and for enrolling in a specific course to identify motivations that may occur as a result of factors unrelated to those measured by the EPS, such as self-actualizing growth needs or motives related to the aging process itself.

A third open-ended question asked how ILR members learned about their programs. This question was used to analyze effective marketing strategies.

*The Education Participation Scale (EPS) A-Form* (Boshier, 1991) was utilized to assess motivations for learning. The EPS-F (first) form was developed by Boshier (1971) in the 1960s and was based on Houle's (1961) three learning orientations. The A (alternative) form of the EPS is more general and applies to a more general population than the F form which worked best with middle-class adults. The development of the A form progressed in five phases. In phase one, 120 students enrolled in adult basic education and college preparatory courses at Vancouver Community College listed 400 reasons about why they enrolled in their course of study. Boshier and an assistant sorted the 400 reasons into categories of *a priori* factors with redundant items being discarded. Boshier and his assistant had unanimous agreement on the categories for the new questionnaire and 10 items were included from the F form to provide a total of 120 items on a four-point scale (*No Influence, Little Influence, Moderate Influence, Much Influence*). During phase two, the 120-item questionnaire was given to 280 different Adult Basic Education and college foundations classes at King Edward College. Two hundred and fifty seven useable A form questionnaires were factor analyzed to produce a 42-item instrument in phase three that was administered to another group of 257 students of varying backgrounds at varying institutions in Canada. Twenty three students took both the A form and the F form, and 65 completed the A form twice, 6 weeks apart. Phase five consisted of gathering validity data (Boshier, 1991). Construct validity was found due to repeated high loadings of the factors in the 42-item EPS, and each factor had the same number of items loaded. Discriminant analysis of 845 subjects revealed 321 men and 523

women, 844 of whom reported ethnic origin as 46.4% North Americans, 36.7% Asians, and 16.9% European. The A form predicted gender and ethnicity with a 60% accuracy rate.

The seven factor loadings were in the following categories:

1. Communication Improvement - enrolled to improve verbal and written communication skills loaded with a factor score on six items with a Cronbach alpha of .89 and a test/retest reliability of .56.
2. Social Contact - enrolled to meet people and make friends loaded six items with an alpha of .95 and test/retest reliability of .75.
3. Educational Preparation - motivated to overcome educational deficiencies and prepare for future education loaded six items with an alpha of .80 and a test/retest reliability of .61.
4. Professional Advancement - concerned with job growth in an existing or future job position loaded six items with a reliability alpha of .80 with test/retest reliability of .70.
5. Family Togetherness - concerned with improving familial relationships loaded with six factors with Cronbach alpha of .82 and test/retest reliability of .74.
6. Social Stimulation - moved to escape isolation, boredom, or unhappiness loaded six items with alpha reliability of .80 and test/retest reliability of .58.
7. Cognitive Interest - desiring knowledge for its "own sake" loaded six items with an alpha of .76 and test/retest reliability of .60.

Fujita-Starck (1996) replicated Boshier's (1991) study using 1,142 students enrolled in noncredit continuing education courses at the University of Hawaii. Six, seven, eight, and nine factor loadings were examined for the EPS items. Fujita-Starck found that the factor loadings were similar to those observed by Boshier (1991). Items 1, 15, 8, 29, 22, and 36 loaded under Communication Improvement with a reliability of .87. Items 37, 23, 30, 16, 2, and 9 loaded under Social Contact with a reliability of .95. Items 3, 10, 24, and 17 loaded under Educational Preparation with a reliability of .75. Professional Advancement loaded items 32, 11, 25, 18, 4, and 39 as well as the two items, 38 and 31, which loaded under Educational Preparation in Boshier's (1991) study. Professional Advancement reliability score was .91. Family Togetherness loaded items 40, 26, 33, 19, 12, and 5 with a reliability of .77. Social Stimulation loaded items 20, 27, 6, 13, 34, and 41 with a reliability of .82, whereas items 28, 42, 25, 21, 14, and 7 loaded under Cognitive Interest with a reliability of .83. The overall alpha in Fujita-Starck's (1996) study was .92.

#### Procedures

1. Ordered EPS surveys from rboshier@interchange.ubc.ca. (Appendix A)
2. Contacted coordinators and sent letters to presidents and/or boards at SMCC-ILR and OLLI-USM to obtain permission to do study (Appendix B).
3. Obtained permission to conduct research from the Human Subjects Protection Institutional Review Board (Appendix C).
4. Selected and matched courses from each school based on course title.

5. Stapled demographic data survey (Appendix D) to top sheet of EPS survey. Used blue survey for SMCC-ILR and yellow survey for OLLI-USM. Stapled comments sheet to back page of EPS survey.
6. Approached instructors for permission to attend one or more class session and recruited volunteers to complete surveys.
7. Attended classes, requested participants using recruitment narrative (Appendix E), and collected demographic and EPS data.

#### Limitations

The results of this study apply only to SMCC-ILR and OLLI-USM programs.

#### Data Analysis

Data were analyzed using multiple analysis of variance (MANOVA) and chi square. The .05 level of significance was used. The answers to two open-ended questions about motives were content-thematic coded by reading and sorting the responses into categories and themes using 3" x 5" index cards and reporting those results. Chi square analysis was used to measure the differences in the number of professional and nonprofessional participants in the two ILR programs.

## CHAPTER IV

### FINDINGS

This chapter presents results from the administration of the Education Participation Scale (EPS) and demographic data sheet to Southwest Mississippi Community College's (rural ILR) and The University of Southern Mississippi's (Osher Lifelong Learning Institute - OLLI) Institute for Learning in Retirement (urban ILR). The data were obtained during the fall semester of 2006 from a population of retirees enrolled in classes in the following six topic areas: (a) money/investing, (b) computer usage, (c) art, (d) history, (e) driver safety, and (e) a destination field trip. At least one session of each class was attended by the researcher. A verbal request for volunteers using the Volunteer Recruitment Narrative (Appendix E) was made. A majority of class members volunteered and only the art class at OLLI required a second session's attendance. One hundred and fifty data sets were collected. Ninety were from the urban ILR and 60 were from the rural ILR.

#### Descriptive Results

Descriptive findings are listed in Table 4. The demographic data were administered to allow self-definition of terms by the responders. Therefore, respondents marked multiple entries in the employment status section of the Demographic Data Survey (Appendix D). One half of the participants were age 65-74 (middle-old). The other half was nearly equally divided between age 50-64 (young-old) and age 75 and older (old-old). The average participant was a female with an income exceeding \$40,000. Forty percent of the participants held advanced degrees. The remainder were equally

likely to hold a bachelor's degree (26%) or to hold less than a 4-year degree (32.8%). The average participant was also a married, White, retired, nonprofessional.

## Hypotheses

### *Hypothesis 1*

Hypothesis 1 stated: There will be no statistical difference between professionals and nonprofessionals in motivational factors for participation in the Institute for Learning in Retirement program.

The means and standard deviations of the motivational orientations by professional status, F ratios, and levels of significance are listed in Table 5 and are low (range 6 to 24) for all motivational factors except Social Contact and Cognitive Interest which are high. Only 146 survey answers are reported since four retirees failed to complete the EPS. This hypothesis was rejected ( $F(7,138) = 2.543, p = .017$ ). There was a statistically significant difference between professionals and nonprofessionals by motivational factor in these two south Mississippi ILR programs. Both groups considered reasons for intellectual interest the strongest motivator followed in decreasing order by Social Contact, Social Stimulation, Communication Improvement, Family Togetherness, Educational Preparation, and Professional Advancement. Professionals ranked motivations for cognitive interest significantly higher statistically than nonprofessionals ( $F = 4.130, p = .044$ ).

### *Hypothesis 2*

Hypothesis 2 stated: There will be a statistically significant difference in motivational factors between ILR participants at a rural college and those at an urban university.

Table 4

*Differences Between ILR Participants*

| Value Label        | Urban  |         | Rural  |         | Total  |         |
|--------------------|--------|---------|--------|---------|--------|---------|
|                    | Number | Percent | Number | Percent | Number | Percent |
| <b>Age</b>         |        |         |        |         |        |         |
| 60-64              | 20     | 22.5    | 16     | 26.7    | 36     | 24.0    |
| 65-75              | 44     | 49.4    | 31     | 51.7    | 75     | 50.0    |
| 75 and Older       | 25     | 28.1    | 13     | 21.7    | 38     | 25.3    |
| Missing Data       | 1      | —*      | 0      | —*      | 1      | 0.7     |
| <b>Gender</b>      |        |         |        |         |        |         |
| Male               | 28     | 31.5    | 16     | 27.6    | 44     | 29.3    |
| Female             | 61     | 68.5    | 42     | 72.4    | 103    | 68.7    |
| Missing Data       | 1      | —*      | 2      | —*      | 3      | 2.0     |
| <b>Income</b>      |        |         |        |         |        |         |
| Less than \$15,000 | 4      | 5.1     | 2      | 4.5     | 6      | 4.0     |
| \$15,000-\$40,000  | 24     | 30.8    | 31     | 41.0    | 55     | 36.7    |
| More than \$40,000 | 50     | 64.1    | 23     | 54.5    | 73     | 48.7    |
| Missing Data       | 12     | —*      | 4      | —*      | 16     | 10.7    |



Table 4 - Continued

| Value Label              | Urban  |         | Rural  |         | Total  |         |
|--------------------------|--------|---------|--------|---------|--------|---------|
|                          | Number | Percent | Number | Percent | Number | Percent |
| <b>Educational Level</b> |        |         |        |         |        |         |
| Less than High School    | 2      | 2.3     | 0      | 0.0     | 2      | 1.3     |
| High School Graduate     | 1      | 1.7     | 10     | 16.7    | 11     | 7.3     |
| Some College             | 15     | 17.0    | 7      | 11.7    | 22     | 14.7    |
| Associate Degree         | 3      | 3.4     | 6      | 10.0    | 9      | 6.0     |
| Trade School             | 2      | 2.3     | 3      | 5.0     | 5      | 3.5     |
| Bachelor's Degree        | 27     | 30.1    | 12     | 20.0    | 39     | 26.0    |
| Advanced Degree          | 38     | 43.0    | 22     | 36.7    | 60     | 40.0    |
| Missing Data             | 2      | —*      | 0      | —*      | 2      | 1.3     |
| <b>Nonprofessional</b>   | 62     | 69.7    | 47     | 78.3    | 109    | 72.7    |
| <b>Professional</b>      | 27     | 30.3    | 13     | 21.7    | 40     | 26.7    |
| Missing Data             | 1      | —*      | 0      | —*      | 1      | .7      |
| <b>Race</b>              |        |         |        |         |        |         |
| Black/African American   | 3      | 3.4     | 24     | 41.4    | 27     | 18.0    |
| White/Caucasian          | 86     | 96.6    | 33     | 56.9    | 119    | 79.3    |
| Other (not specified)    | 0      | 0.0     | 1      | 1.7     | 1      | 1.7     |
| Missing Data             | 1      | —*      | 2      | —*      | 3      | 2.0     |

Table 4 - Continued

| Value Label                        | Urban  |         | Rural  |         | Total  |         |
|------------------------------------|--------|---------|--------|---------|--------|---------|
|                                    | Number | Percent | Number | Percent | Number | Percent |
| Marital Status                     |        |         |        |         |        |         |
| Married                            | 56     | 62.9    | 24     | 40.7    | 80     | 53.3    |
| Widowed                            | 21     | 23.6    | 23     | 39.0    | 44     | 29.3    |
| Divorced/Separated                 | 9      | 10.1    | 4      | 6.8     | 13     | 8.7     |
| Single                             | 3      | 3.4     | 8      | 13.6    | 11     | 7.3     |
| Missing Data                       | 1      | —*      | 1      | —*      | 2      | 1.3     |
| Employment Status                  |        |         |        |         |        |         |
| Employed Full Time                 | 1      | 1.1     | 1      | 1.7     | 2      | 1.3     |
| Employed Part Time                 | 7      | 7.9     | 3      | 5.0     | 10     | 6.7     |
| Self-employed                      | 2      | 2.2     | 4      | 6.7     | 6      | 4.0     |
| Volunteer                          | 1      | 1.1     | 0      | 0.0     | 1      | 0.7     |
| Retired                            | 74     | 83.1    | 46     | 76.1    | 120    | 80.0    |
| Retired/Full Time <sup>2</sup>     | 2      | 2.2     | 0      | 0.0     | 2      | 1.3     |
| Retired/Part Time <sup>1</sup>     | 0      | 0.0     | 1      | 1.7     | 1      | .7      |
| Retired/Self-Employed <sup>1</sup> | 2      | 2.2     | 4      | 6.7     | 6      | 4.0     |
| Retired/Volunteer <sup>1</sup>     | 0      | 0.0     | 1      | 1.7     | 1      | .7      |
| Total Retired <sup>2</sup>         | 78     | 87.5    | 52     | 86.8    | 130    | 86.7    |
| Total Employed                     | 10     | 11.2    | 8      | 13.4    | 18     | 12.0    |
| Missing Data                       | 1      | —*      | 0      | —*      | 1      | .7      |

\*Not reflected in percentages in this column

<sup>2</sup> respondents selected these two items simultaneously.

<sup>3</sup> total at least one response was retired.

<sup>4</sup> total at least one response employed.

Table 5

*Summary of Mean Scores by Professional Status*

| EPS Factor                | Professional (n = 40) |                | Nonprofessional (n = 109) |                | F     | Sig. |
|---------------------------|-----------------------|----------------|---------------------------|----------------|-------|------|
|                           | Mean                  | Std. Deviation | Mean                      | Std. Deviation |       |      |
| Cognitive Interest        | 20.05                 | 3.91           | 18.43                     | 4.39           | 4.130 | .044 |
| Social Contact            | 17.62                 | 5.21           | 17.20                     | 5.74           | .160  | .690 |
| Social Stimulation        | 11.28                 | 4.68           | 11.71                     | 4.87           | 2.380 | .626 |
| Communication Improvement | 10.10                 | 3.78           | 9.76                      | 4.45           | .186  | .667 |
| Family Togetherness       | 9.97                  | 4.38           | 9.36                      | 3.58           | .733  | .393 |
| Educational Preparation   | 8.92                  | 3.17           | 3.17                      | 3.68           | .035  | .853 |
| Professional Advancement  | 6.82                  | 2.27           | 7.66                      | 3.24           | 2.184 | .142 |

The means, standard deviations, F ratios, and levels of significance by rural/urban status are listed in Table 6. Social Contact and Cognitive Interest were high (range 6 to 24). Other motivational factors were low for both groups with the exception of Social Stimulation being midrange for rural participants. These variables reflect 88 completed surveys by urban participants and 59 completed surveys by rural participants. This hypothesis was accepted ( $F(7, 139) = 5.547, p < .001$ ). There was a statistically significant difference between participants at a rural college and an urban university for all EPS motivational factors except Social Contact and Cognitive Interest. Rural participants rated Communication Improvement ( $F = 10.913, p = .001$ ), Educational Preparation ( $F = 15.248, p < .001$ ), Professional Advancement ( $F = 35.435, p < .001$ ), Family Togetherness ( $F = 12.725, p < .001$ ), and Social Stimulation ( $F = 15.007, p < .001$ ) motives higher than urban participants did. There was no statistically significant difference between the two groups' motivation for Cognitive Interest and Social Contact. Both groups were equally motivated for these reasons.

### *Hypothesis 3*

Hypothesis 3 stated: There will be a statistically significant difference in the motivational factors for learning between the young-old (age 50-64) and the old-old (age 75 and older).

The means and standard deviations by age are listed in Table 7. There were 36 participants in the young-old (50-64) age group and 37 participants in the old-old (age 75 and older) age group. Both young-old and old-old rated motivational factors for Social Contact and Cognitive Interest in the high range (range 6-24). All other motivational factors were rated low. This hypothesis was rejected ( $F(7, 65) = .985, p = .450$ ). There

Table 6

*Summary of Mean Scores by Rural and Urban Status*

| EPS Factor                | Mean   | Std. Deviation | F      | Significance |
|---------------------------|--------|----------------|--------|--------------|
| Communication Improvement |        |                |        |              |
| Urban                     | 8.932  | 3.262          | 10.913 | .001         |
| Rural                     | 11.220 | 5.140          |        |              |
| Social Contact            |        |                |        |              |
| Urban                     | 17.205 | 5.718          | .083   | .774         |
| Rural                     | 17.475 | 5.383          |        |              |
| Educational Preparation   |        |                |        |              |
| Urban                     | 8.102  | 2.794          | 15.248 | .000         |
| Rural                     | 10.322 | 4.166          |        |              |
| Professional Advancement  |        |                |        |              |
| Urban                     | 6.330  | 1.514          | 35.435 | .000         |
| Rural                     | 9.051  | 3.875          |        |              |
| Family Togetherness       |        |                |        |              |
| Urban                     | 8.614  | 3.146          | 12.725 | .000         |
| Rural                     | 10.814 | 4.330          |        |              |
| Social Stimulation        |        |                |        |              |
| Urban                     | 10.410 | 4.121          | 15.067 | .000         |
| Rural                     | 13.322 | 4.925          |        |              |
| Cognitive Interest        |        |                |        |              |
| Urban                     | 18.534 | 3.683          | 1.188  | .278         |
| Rural                     | 19.322 | 3.641          |        |              |

Range 6-24

was no statistically significant difference in motivational factors for learning by age. The old-old seemed to place higher value on Social Contact and less value on Educational Preparation, but this was not a statistically significant value.

#### *Hypothesis 4*

Hypothesis 4 stated: There will be a statistically significant difference between the number of professionals and the number of nonprofessionals in the two south Mississippi Institute for Learning in Retirement programs.

The number of professional and nonprofessional participants are detailed in Table 4. There were 62 (69.7%) and 47 (78.3%) retirees classified as nonprofessionals in the urban and rural ILRs, respectively. Of the professionals represented in this sample, 27 (30.3%) were from the urban ILR and 13 (21.7%) were from the rural ILR. This hypothesis was rejected ( $\chi^2(N = 149, df = 1) = 1.37, p = .241$ ). There was no statistically significant difference between the number of professionals and nonprofessionals in the two south Mississippi ILR programs by location. Both groups approximated 73.2% nonprofessionals for every 26.8% professionals represented. One urban participant did not complete enough of the demographic data set to be classified.

The typical urban ILR participant was a White female between the age of 65-74 with an income above \$40,000. She was educated at a bachelor's degree or above, and she was a married, retired nonprofessional. The rural ILR participant was also a White female between age 65-74 with a bachelor's degree or higher; however, more Blacks/African Americans (41.4%) participated in the rural ILR than in the urban (3.4%) ILR. The rural ILR participant was also a retired nonprofessional, but she was equally likely to be married (40.7%) or widowed (39.0%).

Table 7

*Summary of Mean Scores by Age*

| EPS Factor                | Mean   | Std. Deviation |
|---------------------------|--------|----------------|
| Communication Improvement |        |                |
| Age 50-64                 | 9.556  | 4.766          |
| Age 75 and Older          | 9.865  | 4.360          |
| Social Contact            |        |                |
| Age 50-64                 | 15.500 | 5.438          |
| Age 75 and Older          | 18.270 | 4.458          |
| Educational Preparation   |        |                |
| Age 50-64                 | 9.139  | 3.627          |
| Age 75 and Older          | 8.703  | 3.992          |
| Professional Advancement  |        |                |
| Age 50-64                 | 7.639  | 3.279          |
| Age 75 and Older          | 7.678  | 3.489          |
| Family Togetherness       |        |                |
| Age 50-64                 | 9.444  | 3.476          |
| Age 75 and Older          | 9.622  | 3.737          |
| Social Stimulation        |        |                |
| Age 50-64                 | 11.694 | 4.547          |
| Age 75 and Older          | 11.784 | 4.831          |
| Cognitive Interest        |        |                |
| Age 50-64                 | 18.167 | 4.246          |
| Age 75 and Older          | 18.865 | 3.938          |

Range 6-24

## Qualitative Results

When ILR respondents were asked to delineate how they first became acquainted with his or her ILR, a majority (50.7%) of the participants responded from family and friends. Family included spouses and in-laws; friends included neighbors. Combining both ILR groups, print media, such as newspaper advertisements, articles in magazines intended for older adults, brochures, and mail were the second most frequently (16.2%) cited sources of information followed by statements about being a charter member (12.7%). Both urban and rural participants cited friends and family members most frequently (46.5% and 56.8%, respectively). However, rural members cited other ILR members (13.8%) as the second most frequent source of information followed by print media (12.1%). Urban participants listed print media as the second most frequent means of learning about the ILR (19.0%) with charter membership ranking third (15.5%). All sources listed by the 142 participants who responded to this question are listed in Table 8. The least frequently cited sources of information were community events such as HubFest, the Area Development Partnership program, and the YMCA and public facilities for urban ILR members. Each of these four sources was listed by one respondent. The rural ILR members cited community events and speakers as the least likely sources of referral.

When asked to list reasons for joining the ILR program, 84 urban ILR members listed at least one reason and 59 of the rural ILR participants listed at least one reason. The researcher observed during data collection that several respondents at each site skipped the open-ended questions until after completing the EPS scale. They then returned to the questions and gave answers. The number of responses is greater than the



Table 8

*Sources of ILR Promotion*

| Question   | Urban  |                | Rural  |                | Total  |                | Nonprofessional |         | Professional <sup>2</sup> |         | Total  |         |
|--|--------|----------------|--------|----------------|--------|----------------|-----------------|---------|---------------------------|---------|--------|---------|
|  | Number | Percent        | Number | Percent        | Number | Percent        | Number          | Percent | Number                    | Percent | Number | Percent |
| How did you first hear about ILR?  |        |                |        |                |        |                |                 |         |                           |         |        |         |
| No Response <sup>1</sup>   | 6      | — <sup>1</sup> | 2      | — <sup>1</sup> | 8      | — <sup>1</sup> |                 |         |                           |         |        |         |
| Friends/Family Members   | 39     | 46.5           | 33     | 56.8           | 72     | 50.7           | 53              | 51.4    | 19                        | 50.0    | 72     | 51.1    |
| Newspaper, Senior Magazine, Brochures, Advertisement, or Other Printed Media | 16     | 19.0           | 7      | 12.1           | 23     | 16.2           | 16              | 15.5    | 7                         | 18.4    | 23     | 16.3    |
| Charter Members  | 13     | 15.5           | 5      | 8.6            | 18     | 12.7           | 15              | 14.6    | 3                         | 7.9     | 18     | 12.8    |
| From Other Members   | 4      | 4.8            | 8      | 13.8           | 12     | 8.5            | 8               | 7.8     | 3                         | 7.9     | 11     | 7.8     |
| Speakers, ILR Liaisons/ Administrators, Faculty or School Alumni             | 4      | 4.8            | 2      | 3.4            | 6      | 4.2            | 2               | 1.9     | 4                         | 10.6    | 6      | 4.2     |
| Internet, Website  | 3      | 3.6            | 0      | 0.0            | 3      | 2.1            | 3               | 2.9     | 0                         | 0.0     | 3      | 2.1     |
| Events   | 2      | 2.4            | 2      | 3.4            | 4      | 2.8            | 4               | 3.9     | 0                         | 0.0     | 4      | 2.8     |
| Other  | 3      | 3.6            | 1      | 1.7            | 4      | 2.8            | 2               | 1.9     | 2                         | 5.3     | 4      | 2.8     |
| Total Responses  | 84     | 100.0          | 58     | 100.0          | 142    | 100.0          | 103             | 100.0   | 38                        | 100.0   | 141    | 100.0   |

<sup>1</sup>Not included in total<sup>2</sup>Unable to classify one respondent

number of participants surveyed because most participants listed multiple reasons.

Categories were determined by listing key words in responses onto index cards that were sorted to discover emerging themes consistent with self-actualizing motives and growth needs, and the Houle (1961) typology.

Comparing ILR participant motives to the Houle (1961) topology, goal-, learning-, and activity-oriented motives were found. Of the first themes to emerge was the overriding quest to learn. Twenty-seven professional and 20 nonprofessional urban ILR and 13 professional and 14 nonprofessional rural ILR respondents answered with variations of this theme ranging from a basic “to learn” and “to learn more” to more descriptive “to learn new things” and “to learn different things.” Some respondents listed “curiosity,” “continued learning,” and “love of learning.” The second theme observed, program benefits, was cited by five professional and 31 nonprofessional rural members and eight professional members, and 66 nonprofessional members at the urban ILR. Some respondents wanted to “be entertained and enjoy a meal I did not prepare” and to enjoy the “benefits that the program offers.” An urban member said that the “use of USM facilities” was a motivating factor. Survey respondents at both institutions listed simply “socialization,” “fellowship,” or “activities” while others specified the opportunity to meet with specific groups such as “family,” “friends,” “new people,” or “other retirees” as motives for joining ILR. One member wrote that ILR is an “outlet for social get-togethers.” Meeting people was dominant for the rural respondents.

Skill attainment was among the goal-oriented educational motives noted by 6 professional and 18 nonprofessional urban ILR, and five professional and 23 nonprofessional rural ILR members. This theme was portrayed by statements like “to

obtain skills I missed before retirement,” “learn skills I never had time for,” and “learn new ideas.” One ILR member just wanted to “learn current topics.” Traveling and sightseeing emerged as another avenue for learning. Some ILR participants wanted to learn about the surrounding geographic areas “because we recently moved here.” Some simply desired “to learn about Mississippi.” The more common response for this type of motivation to join was either “travel” or “field trips.” This reason for joining was given by seven nonprofessional rural ILR members, and eight professional, and one nonprofessional urban ILR participants. Traveling could be viewed as an educational goal but in another vein is associated with a different theme revealed as the desire to “have fun,” “have fun in my older years,” and “entertainment.” The desire for fun was expressed by 18 urban ILR and nine rural ILR respondents: all nonprofessionals. This spirit for adventure as a response to older adulthood overlaps sightseeing and traveling and the desire to experience “new” things as identified earlier in the learning oriented.

Taken as a group, some simple responses such as “enlightenment,” “intellectually active,” “expand my horizons,” and “stay alert” cited by three professional and nine nonprofessional urban ILR and two professional and six nonprofessional rural ILR members allude to the desire to maintain brain functioning. Likewise, the responses centered around “something constructive to do,” “stay active,” and “I needed to get out” or “to get out of the house” can be construed as a desire to offset the physical, situational, and mental declines often attributed to life at the age of the typical ILR participant in this study.

When the survey respondents were asked to cite in their own words reasons for taking a specific course, 76 urban ILR and 51 rural ILR participants answered this open-

ended question. Overwhelmingly prominent in the responses were the educational motives of the learning-oriented. For example, art, history, and destination field trip participants cited topic specific “to learn” reasons. One respondent wanted to learn “information not covered in previous education.” Several others wanted to “learn about the state I was born in.” Still others desired knowledge of an era in history because “I lived through it.” Under the learning orientation umbrella were older adults desiring knowledge of a specific skill, “wanting to learn something new” and wanting to use knowledge gained to “possibly extend that knowledge to making other crafts.” Education, interest in, or love of a topic as well as skill mastery, enhancement, or attainment was cited 15 times by professional and 60 times by nonprofessional urban ILR members, and 10 times by professional and 63 times by nonprofessional rural ILR members who participated in this study. The noneducational goal of obtaining an insurance discount was mentioned by eight urban ILR and two rural nonprofessional ILR participants in the driver safety courses. This theme fits well with the theme of joining ILR for the benefits it offers to members. Pleasure and adventure themes were cited in conjunction with computer classes (“to play games”) and destination field trips (“have fun,” “pleasure,” “this is the fun part,” and “new adventure”). Eight urban ILR and three rural ILR nonprofessional participants cited entertainment/enjoyment motives. One person from each ILR program admitted to taking a course to “be with friends.” The social motive took an almost nonexistent role as a reason for course selection compared to its being a motivator for joining an ILR program. Another noneducational goal given by nine urban ILR and four rural ILR nonprofessional participants related to maintaining mental and

physical activity. These participants desired to “renew my memory,” “to keep active,” and have “something to do.”

## CHAPTER V

## DISCUSSION

This study was designed to review the motivations of Institute for Learning in Retirement members in an attempt to expand C.O. Houle's (1980) conceptual model of continuing professional education into the retirement years. It compared professional and nonprofessional as well as rural and urban ILR participants to determine if the life transitions of aging lead to the same basic motivation identified by Houle's (1961) typology concerning goal-, activity-, and knowledge-oriented learning. Additionally tested was Maslow's (1962) assertion that adult motivational foci change from basic (deficit) needs fulfillment to self-actualizing (growth) needs fulfillment as part of the maturation process. Because ILR programs offer unique, peer-administered, and peer-facilitated courses, they are in a strategic position to meet the growing demand for older adult education. If the maturation process unites the learning interests of professional and nonprofessional retirees, then these motivations can be utilized to explain and predict learning needs and behaviors and expand programs to a broader spectrum including the underserved, the less-educated, and the less-affluent populations such as older adults living in rural areas and urban ghettos.

This study addressed what motivational factors influence older adults participating in two ILR programs and to what extent these motives varied by professional status, location of ILR, and age. A one-time cross-sectional assessment of data was collected by recruiting six intact groups of volunteers from two south Mississippi ILR programs: (a) Southwest Mississippi Community College ILR in Summit, Mississippi, and (b) The University of Southern Mississippi Osher Lifelong Learning Institute in Hattiesburg,

Mississippi, using Roger Boshier's (1991) Education Participation Scale and a demographic data survey (Appendix B). Motivational orientations from the EPS were divided into seven categories:

1. Social Contact - motivated to learn with others
2. Social Stimulation - motivated to escape loneliness and boredom
3. Professional Development - motivated to enhance current or future job skills.
4. Community Service - motivated to "do good" in civil society
5. External Expectations - motivated due to pressure at home or work
6. Cognitive Interest - motivated to learn for learning's "own sake"
7. Communication Improvement - expansion of verbal or written language skills.

Open-ended questions on the demographic data survey assessed motives possibly not addressed by the EPS as well as ILR marketing strategies.

### Conclusions

The data were collected from 150 respondents at two ILR programs in south Mississippi. Demographic data revealed the majority of ILR participants were married White females between the age of 65-74 with an income above \$40,000. Educational levels attained were the equivalent of a bachelor's degree or higher, and these females were classified as nonprofessionals.

This profile of the typical ILR learner is consistent with other ILR studies (Bynum & Seaman, 1993; Fisher, 1983; Garofolo, 1995; Russett, 1988), older adult studies (Bynum, Cooper, & Acuff, 1978; Heisel, Darkenwald, & Anderson, 1975; Petersen,

1981; Prichard, 1979; Sprouse, 1981), and studies of the general adult population since 1978 (Barnes, 1987; Boshier & Collins, 1985; Creighton & Hudson, 2002; Kim, Collins-Hagedon, Williamson, & Chapman, 2004; Merriam & Caffarella, 1999). Noticeably dissimilar is the high participation rate of Black-African Americans in the rural population. This is not surprising because Black-African American populations often return to their childhood rural towns after retirement to assume management of family homes and parental care and to live more comfortably financially than would be possible in their pre-retirement urban environments. Salaries and retirement pensions that would place this group in the lower class of an urban economy gives them middle- and upper-class status in small towns in south Mississippi. Additionally, the young-old were not the prominent age group represented; it was the middle-old (65-74). The newly retired need an adjustment period after retirement to learn about program availability and the old-old, though an increasing segment of the population, are also the most likely infirm and home-bound group. The equal proportions of young-old (50-64) and old-old (75 and over) reveal that educationally savvy elders are demanding and utilizing programs to meet their needs and to stay connected to one another. The large representation of females cannot be explained by longevity alone. In the rural location, marital status did not affect participation rates (married, widowed, single participated equally). This phenomenon may be explained by women seeking social outlets or the behavior of married spouses caused them to seek fulfillment of interactive needs outside of the home. Social contact was determined for all groups studied as a secondary motivator. The social nature of the females is another explanation for this result. Married and widowed women were likewise equal participants in the urban population.



To address the hypothesis that professional status influenced motivational factors for participating in ILR programs, the EPS was utilized. Mean scores ranged from low to high on a scale from 6 to 24. Motivational factors from the EPS identified as most influential were categorized as Social Contact and Cognitive Interest. The least influential factor was Professional Advancement. An examination of mean scores revealed the order of influence (most influential to least influential) to be (a) Cognitive Interest, (b) Social Contact, (c) Social Stimulation, (d) Communication Improvement, (e) Family Togetherness, (f) Educational Preparation, and (g) Professional Advancement. The mean scores varied by professional and nonprofessional status but the motivational factor mean score ranking was identical. MANOVA revealed a statistically significant difference between nonprofessional and professional status on motivation for Cognitive Interest at the .05 level with professionals rating this factor higher than nonprofessionals.

Groteleuschen, Kenny, Harnisch, and Cervero (1981) postulated that all professional motivations were goal-oriented while Houle (1980) theorized, in his professional model, motivations for the acquisition of knowledge and preparation for change with a social component among professional groups. Childers (1993) concluded that professional motives were different from the general adult population. The results in the present study confirm this as well as Houle's (1980) theory of learning for intellectual interest but not for social contact. Boshier and Collins (1983) likewise linked learning for intellectual interest (for its own sake) to occupational status. However, Dickinson and Clark (1975) as well as O'Connor (1979) found all three of the Houle (1961) motivational factors in elders as originally hypothesized in Houle's (1961) first study (goal-, activity-, and learning-orientations). Finally, Cervero (1988) touted the professionals' zest for

learning. Cervero's study of professionals found that isolated practitioners sought learning in group settings. This study is similar to all of the findings cited about the professionals' love of learning which appears stronger than that of the nonprofessional. This may be due to the number of years spent achieving professional status and the many years of continuing educational pursuits to maintain that status. Pre-retirement learning is dominant in certain professional groups for the sole purpose of continuing professional education as cited by Merriam and Caffarella's (1999), reporting of NCES studies, and Cervero's (1988) observations in his professional learning research studies. Professionals who continue to learn after retirement still seek knowledge acquisition with fervor. This is a continuation of a pattern developed early in life.

The hypothesis that rural or urban location influenced motivation between ILR participants was evaluated using the EPS. Means of the seven motivational factors assessed for the urban group ranged from low to moderate and from moderately low to high for the rural population sample. A statistically significant difference was found at the .05 level for all seven motivational factors between the rural and urban groups. The rural population had higher means for every factor. The ranking of the motivational factors were the same as those identified by the hypothesis testing motivation by professional status. The results of this finding were as expected. Unlike Sprouse (1981) who found in her study of older adults more participation in the rural old-old, a mean education level of 13.3 years, the rural older adults in the present study were middle-old (age 65-74) and educated at 16 or more years. Although, like Sprouse (1981), the elders were more strongly influenced by Cognitive Interest and Social Contact, rural elders in this study were significantly more motivated for all reasons than were urban older adults.

Additionally, Sprouse's (1981) urban elders' increased age was linked to reduced participation. However, this researcher identified equal participation rates between the young-old (50-64) and the old-old (age 75 and older) and that the rural group was slightly younger than the urban group overall. Kim and Merriam (2004) reported Cognitive Interest for their White, well-educated, high income group. Boshier (1977) linked: (a) lower socioeconomic status and advancing age with learning for Escape/Stimulation; (b) decreased educational level and socioeconomic status with motivations for Professional Advancement; and (c) higher educational levels with motivators for External Expectations. Boshier (1977) also found females in his study strongly motivated by intellectual and social reasons. The composition of the rural population in this study resembles some but not all of the above listed findings. The rural females in this study were more often single or widowed, more likely to have less than a bachelor's degree but not more likely to have less than a high school diploma than the urban females. A higher percentage of rural females had moderate incomes (\$15,000-\$40,000) and were more likely to be from a minority ethnicity than the urban females in the present study. Rural white females in this study were equally likely to be married or widowed. This explains the lower range of income since widows who lived as traditional homemakers tend to receive reduced Social Security or pension benefits based on their husband's income. The stronger motivations for all reasons is likely the result of a readiness to learn as part of the maturation process (Maslow, 1962) as well as the desire to recapture educational opportunities that took a secondary priority during earlier stages of life. Garofolo (1995) surveyed ILR participants in the Great Lakes region and found Cognitive Interest, Social Contact, and Social Stimulation strong motivators in this highly industrialized region of

the United States. Because more rural women classified themselves as single or widowed and most of them were retired, one can deduce that life transitions (Aslanian & Brickell, 1980; Laslett, 1987), early isolation due to rural location after retirement, and other late life issues predispose the rural learner to be motivated for a wider variety of reasons. The situational isolation (Cross, 1981) of a rural location provides a basis for motives to learn in every EPS category, for in isolation one finds the need for development and a growing self-concept which provides a readiness to learn and be engaged.

MANOVA was performed to test the effect of age on motivational factors for learning. No significant results were found at the .05 level between the young-old (age 50-64) and the old-old (age 75 and over). Mean scores ranged from low to moderate for the young-old and for the old-old. In general, mean scores were slightly lower in the young-old for all motivational factors except Educational Preparation. Ranking of mean scores of EPS motivational factors from high to low did not change from those identified in the first two hypotheses. The findings of no difference on the variable age agree with both Fisher (1983) as well as Kim and Merriam (2004) who found no significant difference. It is likely that Educational Preparation shown as slightly higher (but not statistically significantly so) is due to late life job transitions or a trend of the baby boom generation toward second or third age career changes. The old-old had higher means for other areas of interest as part of a self-actualizing maturation process identified by Maslow (1962, 1970, 1971). Other links to age were identified in previous paragraphs, noting significant differences in age in combination with other variables in the first two hypotheses (Aslanian & Brickell, 1980; Boshier, 1977; Garofolo, 1995; Laslett, 1987;

Sprouse, 1981). Based on this study, age alone is not a good indicator of learning needs and motivations.

The final hypothesis in this study was tested using chi square to determine the difference in the number of professionals participating in the two ILR programs in south Mississippi. No statistically significant difference at the .05 level was found. Both ILR programs surveyed approximated 73 nonprofessionals for every 27 professionals enrolled in the program. In 1965, Johnstone and Rivera linked increased participation with college educated white collar professions. Likewise, Kim and Merriam (2004) and Prichard (1979) found high participation rates by older professional women in their studies of ILR members and older adults, respectively. This study finds that nonprofessionals at a ratio of nearly 3 to 1 are more attracted to the ILR format of providing educational opportunities. Aslanian and Brickell (1980) offered life transitions as a motive for professional women's leaning. The results of the present study indicate the same transitions motivate nonprofessionals also. Groteleuschen, Harnish, and Kenny (1970) linked increasing age with reduced educational involvement among professionals. They also concluded that all professional education was goal directed with social interaction to exchange new ideas. Other researchers (Childers, 1988; Houle, 1980; Jarvis, 1983; Larson, 1977) like this researcher associate professional learning with strong motives for knowledge acquisition. Dickinson and Clark (1979), unlike these studies and the present study, found activity-oriented motivations among professional learners.

Qualitative analysis of open-ended questions found that word-of-mouth marketing was a dominant method for learning about the existence of ILR programs. Word-of-mouth advertising was of two types: (a) family and friends (most frequently cited source

for urban and rural ILR members) and (b) other ILR members (a secondary source for rural ILR participants). The other effective means of soliciting members was print media (a secondary source cited by urban participants). Community events were the least frequently cited source for learning that ILR programs existed. From this analysis it can be concluded that situational and personal factors resulting from life transitions that occur with advancing age and retirement do not affect the strong bonds of social interaction (Aslanian & Brickell, 1980; Cross, 1981; Havighurst, 1969). As Merriam (1993, p. 38) pointed out, basic needs (Maslow, 1962, 1970, 1971) must be fulfilled before self-actualization can occur. Belonging to a group of friends and associates provides an explanation for information sharing about ILR programs by friends, family members, and other ILR members. Print media is a traditional mode of keeping abreast of the community and the world. It does appear, however, that older adults reduce their participation at public events geared toward the general population. Strong social needs may induce the continued use of impersonal tools such as newspapers, brochures, and advertisements.

Content-thematic coding of the reasons for joining ILR revealed that each of Houle's learning orientations (goal-, activity-, and learning-orientations) were represented. The love of learning and a desire to learn dominated the reasons cited by urban and rural responders. This theme was followed by a desire for socialization and fellowship. This theme correlates well with the activity orientation for learning. Rural respondents cited these two themes with greater frequency than urban ILR responders. Professionals were equally likely to cite these reasons as nonprofessionals. Goal-oriented reasons for joining were noted with an emphasis on learning new things. The goal-

oriented reasons for joining were linked to a spirit of adventure such as having fun and being entertained both through education and travel. The self-actualizing goal of enlightenment as noted by Maslow (1960, 1970, 1971) as part of the maturation process was also identified. Maintaining physical and mental functioning and enjoying program benefits were additionally mentioned as recurring themes.

These findings are consistent with Boshier and Riddell (1978), Heisel, Darkenwald, and Anderson (1975), Morstain and Smart (1974), Petersen (1981), and Sheffield (1964), all of whom found self-actualizing learning motives. Boshier (1971) and Fisher (1983) added the social desire to be with others as an equally strong motivator with intellectual curiosity in the older adult. Neugarten (1976) correlated social interaction with psychological well-being in persons aged 50-70. The element of fun, pleasure, and adventure through socialization and education found in the present analysis affirm this connection. Maintaining cognitive and physical functioning are both goal-oriented behaviors, as is a desire to reap ILR program benefits. It appears that professional status after retirement gives the ILR participant stronger goal orientations like those found by Groteleuschen, Harnisch, and Kenny (1980) during the pre-retirement years. Intimacy and attachment, autonomy, and competency all appear important to older adults and are the base of their learning needs.

Reasons for taking a specific course channeled motives into narrower themes. Topic or skill specific learning either for (a) love of learning or (b) skill attainment, mastery, or enhancement was the dominant theme for each group surveyed. Noneducational goals again included benefits offered by ILR courses and pleasure. Although socialization was the second highest identified factor by the EPS and reasons

for joining ILR, it was practically not a relevant reason for taking a particular course. Petersen (1981) also identified course content as a significant indicator of participation. Bynum, Cooper, and Acuff (1978) as well as Boshier (1977) and Fisher (1983) found similarly that practical subject matter motivates the older adult to participate in learning activities. Maslow (1962) stated that the individual determines whether this useful learning activity arises from a growth or deficit state. It appears to this researcher that a combination of motivational factors culminate to form a complex goal-oriented desire to attain knowledge or skills fostered by the transitions of life that occur post-retirement. The needs of the older adult are indeed self-actualizing in that the overwhelming pursuit of learning for its own sake predominates both the professional and nonprofessional retirees. Yet the constant movement between deficit motivational factors (belonging/socialization) shown as a secondary motivation in nonprofessionals demonstrates the struggle to satisfy both growth and basic needs on a continuum to maintain balance between the losses of this life stage and the necessary renewal to keep abreast of changes in the daily environment.

#### Limitations

1. Responses to open-ended questions were influenced by EPS items and may not reflect true motives for joining the ILR or for taking a specific course thereby limiting results.
2. Population densities and socioeconomic conditions in south Mississippi are different from those of other more populous states. This may affect generalizability of findings.



3. The definition of professional was extremely restrictive and may underestimate the influence of this subpopulation on the results.

4. These results may apply only to ILR members enrolled in the six courses studied in the fall of 2006. Generalizations may not be made to non-ILR members or to persons enrolled in other course topics.

#### Recommendations

The basic intent of this study was to expand and refine the knowledge of professional learning motivation post-retirement and to assess the applicability of the ILR model for rural and other disadvantaged elderly populations. In seeking to determine if there was a merging of motivational factors to self-actualizing (growth) orientations with age as hypothesized by Maslow (1962, 1970, 1971), some additional study needs were identified. Another research venue could examine motives for non-ILR participation and participation within ILR of members not actively taking a course. Additionally, the disadvantaged older adult provides a unique subpopulation for further research.

The following recommendations arise from the implications and findings of the present study:

1. Additional qualitative study with different ILR and non-ILR participant populations is needed to compare results and test validity and reliability of thrill seeking/pleasure motives.

2. An evaluative study can be utilized to determine the effect of participation on older adults' learning motivations in ILR and other learning situations.

3. Program expansion to reach the disadvantaged populations can be achieved by setting up cooperative exchanges of resources and facilities between ILR

members and other agencies and organizations (e.g., retirement centers, senior centers, retirement communities, etc.) that serve the varying needs of the older adult.

4. Educational environments that emphasize health and fitness should be utilized to promote awareness and active involvement in learning activities.

5. Outreach, marketing, and publicity efforts must reach beyond word-of-mouth advertising to print and nonprint media to attract and involve lower socioeconomic individuals, minority elders, and older men.

6. Partnering with private foundations and federal, state, and local governments to increase funding for programs and transportation access to facilities where learning opportunities are fostered should be implemented.

7. Develop additional ILR models to meet the needs of the underserved elderly emphasizing the peer-administered and peer-taught nature of the program and the lack of homework and exams to attract these members.

8. Develop sliding-scale or grant-funded scholarships where necessary to increase and maintain ILR participation.

## APPENDIX A

## EDUCATION PARTICIPATION SCALE AND SCORING SHEET

The Education Participation Scale (EPS) Questionnaire (Form A) is a copyrighted instrument written by Roger Boshier in 1982. Copies of the questionnaire may be obtained by writing the author at his e-mail address: [rboshier@interchange.ubc.ca](mailto:rboshier@interchange.ubc.ca)

## EDUCATION PARTICIPATION SCALE SCORING KEY

The Education Participation Scale (EPS) Questionnaire Scoring Key (Form A) is a copyrighted instrument written by Roger Boshier in 1982. A copy of the EPS Scoring

Key can be obtained by writing the author at his e-mail address:

[rboshier@interchange.ubc.ca](mailto:rboshier@interchange.ubc.ca)

## APPENDIX B

## LETTERS TO ILR BOARDS

3028 Mesa Drive  
Hattiesburg, MS 39402  
January 29, 2006

Ms. Jeannette Price  
USM-ILR Board  
294 Hickory Hill Loop  
Purvis, MS 39475

Dear ILR Board Members,

I am a doctoral student at The University of Southern Mississippi who is very interested in ILR programs and participants and I need your assistance. I am writing to request that your Institute for Learning in Retirement (ILR) participate in a research study that I am undertaking which will focus on the motivations and reasons participants enroll in ILR programs. This study is being done as part of my doctorate degree research requirements in Adult Education.

The principal objective of this study is to identify patterns of participation and motivation of ILR program participants along with demographic characteristics of professional, nonprofessional, rural and urban subgroups to assist in marketing strategies for program development. This study requires a visit to approximately six ILR courses to obtain responses to two short survey instruments. It would be helpful if the courses could be attended by myself to collect responses anonymously. Only the name of the ILR program and the specific course name will be utilized as identifying information. I will contact each course instructor to request permission to survey his or her class and arrange a time to visit the class to administer and pick up the surveys.

Enclosed for your review are copies of the survey instruments. Please indicate your program's willingness to participate by returning a note on your letterhead. I will contact you for a roster of courses to be offered from September 2006 through May 2007 and contact information for the instructors. I have enclosed a self-addressed, stamped envelope for your convenience.

I look forward to hearing from you by March 15, 2006. Thank you for your time and consideration of this request. If you have any questions, please call me at 601-296-0083.

Sincerely,

Constance M. Farmer  
Doctoral Candidate  
Department of Educational Leadership and Research  
The University of Southern Mississippi  
Hattiesburg, MS 39406

3028 Mesa Drive  
Hattiesburg, MS 39402  
January 29, 2006

Mr. Johnny Malone  
SMCC-ILR  
Kenna Hall  
Summit, MS 39666

Dear ILR Board Members,

I am a doctoral student at The University of Southern Mississippi who is very interested in ILR programs and participants and I need your assistance. I am writing to request that your Institute for Learning in Retirement (ILR) participate in a research study that I am undertaking which will focus on the motivations and reasons participants enroll in ILR programs. This study is being done as part of my doctorate degree research requirements in Adult Education.

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I look forward to hearing from you by March 15, 2006. Thank you for your time and consideration of this request. If you have any questions, please call me at 601-296-0083.

Sincerely,

Constance M. Farmer  
Doctoral Candidate  
Department of Educational Leadership and Research  
The University of Southern Mississippi  
Hattiesburg, MS 39406

## APPENDIX C

## HUMAN SUBJECTS REVIEW BOARD APPROVAL



The University of  
Southern Mississippi

Institutional Review Board

118 College Drive #5147  
Hattiesburg, MS 39406-0001  
Tel: 601.266.6820  
Fax: 601.266.5509  
www.usm.edu/irb

**HUMAN SUBJECTS PROTECTION REVIEW COMMITTEE  
NOTICE OF COMMITTEE ACTION**

The project has been reviewed by The University of Southern Mississippi Human Subjects Protection Review Committee in accordance with Federal Drug Administration regulations (21 CFR 26, 111), Department of Health and Human Services (45 CFR Part 46), and university guidelines to ensure adherence to the following criteria:

- The risks to subjects are minimized.
- The risks to subjects are reasonable in relation to the anticipated benefits.
- The selection of subjects is equitable.
- Informed consent is adequate and appropriately documented.
- Where appropriate, the research plan makes adequate provisions for monitoring the data collected to ensure the safety of the subjects.
- Where appropriate, there are adequate provisions to protect the privacy of subjects and to maintain the confidentiality of all data.
- Appropriate additional safeguards have been included to protect vulnerable subjects.
- Any unanticipated, serious, or continuing problems encountered regarding risks to subjects must be reported immediately, but not later than 10 days following the event. This should be reported to the IRB Office via the "Adverse Effect Report Form".
- If approved, the maximum period of approval is limited to twelve months. Projects that exceed this period must submit an application for renewal or continuation.

PROTOCOL NUMBER: 26033002

PROJECT TITLE: **Differences in Learning Motivations of Professionals and Nonprofessionals Participating in Two South Mississippi Institutes for Learning in Retirement**

PROPOSED PROJECT DATES: 09/01/06 to 05/31/07

PROJECT TYPE: **Dissertation or Thesis**

PRINCIPAL INVESTIGATORS: **Constance Farmer**

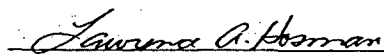
COLLEGE/DIVISION: **College of Education & Psychology**

DEPARTMENT: **Educational Leadership & Research**

FUNDING AGENCY: **N/A**

HSPRC COMMITTEE ACTION: **Expedited Review Approval**

PERIOD OF APPROVAL: **05/15/06 to 05/14/07**

  
Lawrence A. Hosman, Ph.D.  
HSPRC Chair

5-16-06  
Date

HUMAN SUBJECTS REVIEW FORM  
UNIVERSITY OF SOUTHERN MISSISSIPPI  
(SUBMIT THIS FORM IN DUPLICATE)

Protocol # 26033002  
(office use only)

Name Constance Marie Farmer Phone (601) 296 - 0083

E-Mail Address cestfranklin@yahoo.com

Mailing Address 3028 Mesa Drive / Hattiesburg, MS 39402  
(address to receive information regarding this application)

College/Division College of Education/Psychology Dept Educational Leadership & Research

Department Box # 5023 Phone 601-266-4568

Proposed Project Dates: From September 2006 To May 2007  
(specific month, day and year of the beginning and ending dates of full project, not just data collection)

Title Differences in Learning Motivations of Professionals and Nonprofessionals Participating in Two South Mississippi Institutes for Learning in Retirement

Funding Agencies or Research Sponsors \_\_\_\_\_

Grant Number (when applicable) \_\_\_\_\_

New Project

Dissertation or Thesis

Renewal or Continuation: Protocol # \_\_\_\_\_

Change in Previously Approved Project: Protocol # \_\_\_\_\_

Constance M. Farmer  
Principal Investigator

February 15, 2006  
Date

W. Lee R...  
Advisor

10/25/05  
Date

LA  
Department Chair

2/15/06  
Date

**RECOMMENDATION OF HSPRC MEMBER**

Category I, Exempt under Subpart A, Section 46.101 ( ) ( ), 45CFR46.

Category II, Expedited Review, Subpart A, Section 46.110 and Subparagraph (f)

Category III, Full Committee Review.

[Signature]  
HSPRC College/Division Member

05/4/06  
DATE

Lawrence A. [Signature]  
HSPRC Chair

5-16-06  
DATE



## LETTER FROM USM-OSHER LIFELONG LEARNING INSTITUTE



The University of  
Southern Mississippi

118 College Drive #5055  
Hattiesburg, MS 39406-0001  
Tel: 601.266.4210  
www.usm.edu/ncpc/llr

Osher Lifelong  
Learning Institute

## OFFICERS

Jeanette Price, *President*  
Hal Blackmon, *Vice President*  
Fran Hegwood, *Secretary*  
Nita Davis, *Associate Secretary*  
John Kochtitzky, *Treasurer*  
Ruby Cook, *Historian*  
Hilda East, *Past President*

BOARD OF  
DIRECTORS

Charles Poston  
Doris Davis  
Louise Ingram

UNIVERSITY  
LIAISON

Sue Pace

Constance Farmer  
3028 Mesa Drive  
Hattiesburg, MS  
39402

Dear Constance,

I am writing to inform you that after a poll of the Osher Lifelong Learning Institute's Board of Directors, your request to use the OLLI members as a subgroup for your research, have been approved with the following conditions;

One, your demographic survey will need to delete "ILR" to reflect our name change to Osher Lifelong Learning Institute or OLLI, and two, we would like to have a copy of a summary of the data collected pertaining to our OLLI members.

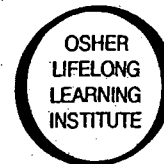
You will need to contact me in August in order to finalize plans for conducting the survey.

Please know that we wish you much success in gathering and analyzing the data for your research.

Cordially,

Sue Pace

cc: Jeanette Price



LETTER FROM SOUTHWEST MISSISSIPPI COMMUNITY COLLEGE  
INSTITUTE OF LEARNING IN RETIREMENT



College Drive  
Summit, Mississippi 39666  
601-276-2000

February 1, 2006

Constance M. Farmer  
3028 Mesa Drive  
Hattiesburg, Mississippi 39402

Dear Ms. Farmer:

On February 1, 2006, the board of the Southwest MS Community College Institute for Learning in Retirement agreed to participate in your research project.

Thanks!

Sincerely,

*Jerry B. Malone*

Jerry B. Malone

## APPENDIX D

## DEMOGRAPHIC DATA SURVEY

Location of ILR: \_\_\_\_\_

How did you first learn about ILR? \_\_\_\_\_

Reasons for joining ILR: \_\_\_\_\_

Name of Course: \_\_\_\_\_

Reasons for taking this course: \_\_\_\_\_

Age:    \_\_\_ 50-64  
           \_\_\_ 65 to 74  
           \_\_\_ 75 or Older

Race:    \_\_\_ Black or African American  
           \_\_\_ White  
           \_\_\_ Other (please specify) \_\_\_\_\_

Gender:  \_\_\_ Male  
           \_\_\_ Female

Marital Status:  
           \_\_\_ Married  
           \_\_\_ Widowed  
           \_\_\_ Divorced or Separated  
           \_\_\_ Single  
           \_\_\_ Other (please specify)

Annual Income:  
           \_\_\_ Less than \$15,000  
           \_\_\_ \$15,000-\$40,000  
           \_\_\_ More than \$40,000

Education:  
           \_\_\_ Less than High School  
           \_\_\_ High School Graduate  
           \_\_\_ 2 Years' College  
           \_\_\_ Community College or  
           \_\_\_ Trade School  
           \_\_\_ Associate Degree  
           \_\_\_ Bachelor's Degree  
           \_\_\_ Advanced Degree

Employment Status:  
           \_\_\_ Full-time  
           \_\_\_ Part-time  
           \_\_\_ Self-employed  
           \_\_\_ Retired  
           \_\_\_ Volunteer

## Other Information

\_\_\_ Student Teaching,  
 \_\_\_ Preservice Training, Internship,  
 \_\_\_ or Professional School  
 \_\_\_ State or Association License,  
 \_\_\_ Certification, or Registration

Return of this form, your comments, and the Education Participation Scale survey is consent to use information for data collection and analysis.

## Comments

## APPENDIX E

## VOLUNTEER RECRUITMENT NARRATIVE

Hello, my name is Constance Farmer and I am a doctoral student at The University of Southern Mississippi. I am conducting a research study about retirees in the Institute for Learning in Retirement and their motives for participation. This study has been approved by the Human Subjects Review Committee which ensures that research projects involving humans follow federal regulations and your ILR Board. I am here today to ask that you assist me in my research by completing a survey about yourself and the reasons you are participating in this particular course: (name the course). The survey will take about 20-25 minutes to complete, and all responses will be given anonymously and confidentially. Surveys will be shredded after the data have been analyzed. Please do not put your name on the survey, and answer questions as they apply to this particular course only. Thank you in advance for your time, energy, and support. Do you have any questions?

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