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EXPLORING EDUCATIONAL INTERESTS AND PREFERENCES OF
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ABSTRACT

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This qualitative study examines the lived experience of 12 older adults aged 55 – 86, participants in the Osher Lifelong Learning Institute and living independently in the Midwest of the United States. The primary data collection method was semi-structured interviews. Data from the interviews were coded and analyzed guided by the research questions. The research resulted in four major themes; sociability, desire for learning, educational barriers or affordances and environmental factors. Clusters surrounding the main themes were analyzed using MAXQDA software guided by the principles of narrative, qualitative research. The illuminated experiences of the older adults serve as a framework for the discussion of exploring educational interest and the educational preferences older adults nominate. The study revealed as major themes 1. the sociability and social interaction opportunities older adults seek, 2. the desire of learning for the sake of learning, 3. barriers or affordances life-long learning poses on the older adult and 4. the preferences for factors in a learning environment.

Keywords: lifelong learning, education interest, learning environments, environmental gerontology, baby boomers, elderhood, older adults

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Chapter 1

Introduction

Statement of the problem

I start my review by addressing negative stereotypes in ageism forming a paradigm of disengagement and decline in the study of old age and the process theories of aging. In my critique, I will explain why the existing paradigm of aging is no longer useful, representing too many broad negative stereotypes and only limited positive. The old paradigm of aging does not encourage social participation, it ignores the wisdom and productive contributions older persons make and does not reflect the personality of the baby boomers as the current change agent understanding aging, their quest to be productive into late life, and their needs for self-actualization within institutions and their life course perspective. For the past two decades, theories of aging have tried to embrace successful aging. I explain that the model of successful aging lacks the inclusion of a life course perspective and the influences of positive action the society would take to support a person positively, rather than just moving into senescence. The model of successful aging is focusing much on health status and individual choices,

and efforts older adults must make to maintain health, without considering institutional influences on the aging process.

The shift in paradigm from a grim into the positive attitude in aging is a consequence of the current retiring cohort reacting against and showing resistance toward the negative model, in disagreement with the idea that their life is “done,” the sense of finality when they might leave the workforce. I have shown the baby boomers as a change agent and how they redefine what their “place” is not and how they question what their “place” should be. As a cohort, they re-define every institution and use their experiences in middle age as a crossover to define the opportunities they want to afford in later life, seeking integrity versus despair (Erikson, 1986).

From my constructivist perspective, gerontology is moving from a negative point of view to a positive one through the agency of successful aging, for me defined as a transitional period of history, and the baby boomer cohort as a powerful driving force. As a constructivist, I frame the paradigm shift by the causes or influences leading to it. Influences include the substantial number of older adults ready for retirement and their increased longevity, the baby boomers as

cohort demanding policies which will accommodate positive aging and policy in education, social forces, economic drivers, health, and care. Those influences are mediated by re-considering institutions and institutional changes, adjustments of stereotypes, policy change, social participation, and technology.

The consequences of the paradigm shift into one of positive aging are, long-life learning and education opportunities, entrepreneurship, and encore careers, creating a place and growing in place with resulting design implications, increased consumption and volunteerism.

The framework (Figure 1) illuminates interesting and productive life course possibilities for older persons, but no prescription how this will be orchestrated.

Figure 1

Framework of the paradigm shift toward positive aging

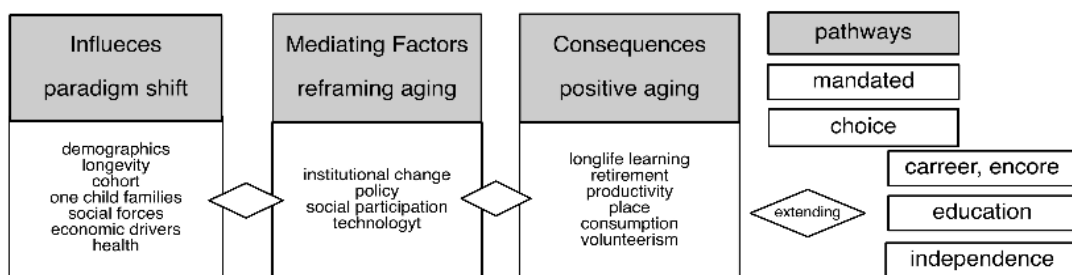


Figure 1

One of the illustrated consequences of positive aging is an increased interest or need in education and participation in long-life learning. Understanding the reasons will be translational.

A paradigm of decline and disengagement

Disease and decline. When the perception of the older population does not match realities, pre-justices will dominate our thinking. When this perception is prevalent, ageism occurs, a stereotyping making it difficult to see what the state of being in the older population is. Ageism isolates the older generation socially and perpetuates our fear of aging. The past three decades of publications in the *Journal of Gerontology* represent a grim focus and illustrate well the emphasis among gerontology scholars on aging. A clear majority of publications are concerned with Alzheimer's disease, dementia, chronic rheumatology, depression, hypertension, cerebrovascular diseases and the like. Only a few articles illustrate the positive possibilities of aging. The defining characteristic of aging is that the longer we live, the more susceptible we become to a wide range of health problems and situations concerning well-being (Kirkwood 2014). The myth that

many older people have incomes below the poverty level persists, poverty level as defined by the Federal government.

In contrast, the clear majority of older adults do not live below the poverty line (U.S. Census 2009). Affluence is an important notion since the scholarly literature in Gerontology, and Social Sciences controversially debates co-relations between affluence, health, and well-being (Schuller et al. 2004). As a fact 90% of older Americans live above poverty lines, most of those over 60 have had some college education and are in better condition economically and physically than preceding generations in history. The later years of life need not be in despair. The aging myth “the older you get, the sicker you get,” is rendered false by a study of centenarians which have marked delay in disability towards the end of their long lives and became a model of aging well. It is much more the case “the older you get, the healthier you have been” throughout your life course. The study concludes, as a person approaches very old age, diseases must be delayed or escaped towards the end of those longest lived, and health span equals lifespan (Rau and Vaupel 2014).

Language. The historical image, and the early literature on aging has generally reinforced the negative stereotypes of old age, presents old age often as being a time of physical decline, depression in the time of loneliness and disengagement. Generally, in society, ordinary people tend to look at old age as “over the hill,” “club of geezers” or the like. The language carries a negative into everyday conversation. The largely negative language used in the mainstream, as well as the language used in the literature, direct our thinking of old age and how we think of it. The language describing the challenges of aging includes “demographic time bomb,” “graying society,” “senile” and the like. Stereotypes include that old person with physical or cognitive decline become a social problem, families no longer want to care for their elderly family members, and in the past, literature, and film, television, advertising, even birthday cards, and road signs have supported and exaggerated the elderly’s prevalence of decline. In the 50s and 60s, advertisement in television is featuring older people, though they were grossly underrepresented, portrayed with a lack of style and sophistication while it is the young people being trendy and they seem to be the target of

advertisers (Miller, Leyell & Mazachek 2004). Ageist thinking and the low expectations of old people in society, in the past, have disadvantaged the elderly population and have adversely affected how we speak of them. Older people report their concerns about newspaper stories and the portrayal of old age and the accuracy of news and its attitude towards old people (AARP 2006, Chafetz et al. 1998). The inaccuracy is not surprising. Old people are often in the news for being a threat to the healthcare system, mistreated by care staff or family or subject to crime because of their age. Recent reporting focus on Alzheimer's disease in stories on aging, though maybe welcomed to advance medical teaching and research understanding, is disproportionate and reinforces the notion of frailty and helplessness of the elderly. The bombardment of generally negative images over the past century is likely defining the image of aging in society.

The mechanization and industrialization in the workplace in the past century diminished the status and the capacity of being a role model of even wise and experienced older adults. Additionally, the long-standing cult of youth and the depiction of old age in popular culture and news media have

created false beliefs in aging and the quality of life of old persons (Boyd 1984).

This negative view is also visible in an ill-fated dichotomy between the medical model focusing on the disease and the social model of elderly healthcare focusing on the person. Healthcare for the elderly is often still a prosthetic approach and dismisses limited functioning as being inevitable and decline in age as irreversible (Kane 1998; Boyd 1984). Physical disability, Cognitive Impairment, and incontinence are often wrongly managed as primarily social problems without exploring reversible or modifiable underlying medical conditions (Kane 1998). Only more recent literature has focused on effective eldercare predicated upon a comprehensive geriatric assessment and including the elder's well-being, their activity status, support system, isolation or institutionalization. The substantial number of old people in nursing and residential care homes underlines the general assumption that there has been a widespread decline in family piety toward old adults.

Homogeneity. We often speak of the elderly, and this is prevalent in the literature as if older adults were a uniform group and discussing the group of the old-age population as “elders” or “seniors” as though this is a homogenous

category. The concept of aging is not the same for everyone, and to think of growing old or being old is not a universal experience. Stereotyping growing old make it seem that aging is a uniform occurrence or a prescribed way of life when indeed, the experience of aging and the meaning of being old is varied and multifaceted.

The older person today differs from older adults in the past in three ways. The experience of old age is marked by considerable diversity in the characteristics and experiences of the age group. Secondly, older adults today live longer, and increased longevity provides opportunities for longer and more meaningful interactions with their children and grandchildren. Thus there is potential for meaningful exchanges across generations (Uhlenberg 2005). Thirdly, structural changes in the composition of families, with high rates of cohabitation and childbearing outside of marriage as well as high divorce rates, contribute to the wearing of intergenerational bonds (Seltzer, 2000). The baby boomers who largely experienced changes in the structure of families are now entering old age (Seltzer 2004).

Disengagement. The oldest adult is often seen as lonely and disengaged

(Forbes 1998). The adherence to the stereotype of the lonely elderly is striking, considering that the general public has become more knowledgeable about the circumstances of older adults and their financial, material and residential conditions. Loneliness indeed does occur, but its prevalence has been exaggerated. Studies consistently show only about one-fifth of old and oldest adults are lonely sometimes and only one-tenth response they are lonely very often (Dykstra 2009). The persistence of ageist attitudes underscores the frame of reference in analyzing loneliness. Concerns about the cost of healthcare for an aging population and concerns how older adults can be self-reliant so they would not depend on services impact public policy on aging. This is in my view unfortunate as the quality of personal relationships, family and the network of friends are one of the best predictors of health and life quality. However, scientific findings in empirical research on well-being sometimes contradict popular beliefs prevalent in our culture (Diener, Suh 1997).

Historically the theory of disengagement evolves from Cumming et al. (1960), Cumming (1963) and Henry (1964) and their outline of aging theorize that growing old involves gradual and inevitable mutual withdrawal or

disengagement, resulting in decreased interaction between an aging person and others within the social systems they belong. When disengagement is complete, Cummings (1963) argues, “the equilibrium that existed in middle life between the individual and society has given way to a new equilibrium characterized by greater distance, and a changed bias for solidarity” (p.377).

In its early form, the disengagement theory suggested a decisive biological basis for a loss of interest or involvement in the environment, resulting from social pressures and difficulties of adaptation. Disengagement here describes the departure of the interpenetration of an older person from the society to which the person belongs (Henry 1964). Interestingly the theory argues that disengagement is mainly concerned with the departure of children from families, the men’s retirement and the women’s widowhood. These are concepts of the role of sexes, which did not withstand the test of time.

Havighurst (1968) argues, based on the findings of the Kansas City Study of Adult Life, that the disengagement theory needs more facets to account for success in aging, including the consideration of a personality dimension. He concludes that a constructive and active approach to life in later years may

support, that disengagement does not contribute to optimal aging. A plethora of criticism and confirmation of theory exist over the following two decades.

Rigidity. “You cannot teach old dogs new tricks.” A myth that hangs on despite the obvious presence of older people working in successful careers, going to college, and participating in many other demanding activities. A common belief is that older adults have rigid thinking, do not use computers and do not engage in learning so. In fact, over 40% of those 65 of age and older use the Internet. Most use computers at home to access health information, supporting their decisions on treatment options, and many older adults attend evening classes to learn the use of technology (O’Hara 2004). Older adults are often perceived disengaged, and if disengagement begins, it is a gradual process, not a single event. While the perception of disengagement of older adults is likely a result of portrayal and awareness of community presence of the elderly, it results from a combination of factors: changes in support, changes in technology, change in physical and cognitive abilities, and personal circumstances. Barriers to learning new tricks typically include a lack of confidence or the fear of using modern technology. Often it is the absence of

adequate support. Also, physical and cognitive changes such as reduced manual dexterity and impaired short-term memory may result in a barrier to new learning (Damodaran, Olphert, Phipps 2013).

Sexuality. Research has often reported important links between sexuality and health or illness across the lifespan, including in old age. Sexuality remains important in interpersonal and intimate relationships as well as the quality of life in older persons (DeLamator, Moorman 2007; Graugaard, Pedersen, Frisch 2012). Contrary to the general belief that most older people have no interest in or capacity for sex. On a culture related level, structural factors, for example, the social regulation of aging people's sexuality, operates mainly through societal norms and beliefs which tend to desexualize the process of aging. Stigmatizing is the consequence and those who continue to be sexually active, despite their old age, do not fit into the public image and collective beliefs. Western society faces difficulties, although increasingly defined by diversity and multicultural influences, that include variability and openness about sexual and gender-related dynamics. Laumann et al., (2006) in their global study of sexual attitudes and behaviors, have identified relationships

between sexual well-being among older adults and societies with a larger degree of gender equality, but the effects of societal norms on the sexual satisfaction in older adults as not been attempted and is still an unknown.

Although sexual drive and sexual activity do decline with age, 75% of married men over 60 years old and 63% of men aged 80 to 102 years old are still sexually active. However, the stereotype that old people are sexless persists (Goodman 2002). Remarriage in late adulthood is usually a happy event, helping both spouses feel younger, less lonely, happier, and sexier than they did before. Sexual interest can be high, although the response time can be slower and satisfaction is likely to be closely related to satisfaction in the relationship (Lingren 2001).

The boomer generation as an agency

Members of the “boomer” generation, those born between 1946 and 1964, are rapidly retiring in the United States, as in other parts of the world, and drive the increasing number of older adults in the population. According to the Census Bureau’s projections of the elderly population by the year 2050 (U.S. Census Bureau 2009; Kinsella & He, 2009), 1 out of 4 American will be age 65 years or

older. The baby boomer generation mostly drives the growth in the older population. The oldest old, those who are aged 85 years and older, are the most rapidly growing age group and will reach 5 percent of all Americans by 2050. The preceding indicates dramatic demographic change will be taking place in aging America. This change will require creativity and systems policy development and implementation, and the larger societal response will be critical. America will face more pressing issues and is on a more crucial policy timetable than other parts of the world, as the baby boomer cohort is central to population aging. The numbers of old, those 65 years and older, and very old people, those 85 years of age and older, will increase sharply over the next 10 to 20 years in many other countries as well.

In the very near future baby boomers will inherit from their aging parents, the largest wealth transfer in the history of the United States. While this new financial cushion will benefit a large number of the baby boomers, a significant number of less well-off boomers will not be affected by the transfer of wealth and thus the wealth differentials which existed during the boomers middle-aged years will remain. However, the disparities in wealth may affect the

quality of health care, housing and other lifestyle options available to the aging baby boomers (Joint Center for Housing Studies, 1999). It is unclear how the baby boomer cohort will affect the political landscape and resulting public policy development, but the challenges of policy research, development and implementation are substantial. To date, there is no national effort developing a national aging policy for the 21st century. Cuts in aging policy across many policy areas seem to be unique to the United States. Active social engagement of the baby boomers indicates, they will continue to vote at a higher rate and with their vote will set the policy agenda. Social Security, Medicare, and healthcare policy are already top on their “securing lifestyle” agenda (AARP 2016). The cohort and AARP, The American Association of Retired Persons as their most powerful lobbyist, will pay attention to and successfully protect entitlement issues because they represent significant numbers as a voting block (Healy 2003). While the baby boomers parents tended to be more conservative, resistant to change while they entered retirement and in their later years of life, a significant portion of the baby boomers might return to the social activism and liberalism they had adopted as young adults (Hodge, 2007). A lack of political courage among

current policy leaders led to severely underestimating the lead-times needed to create policies addressing the aging of the baby boomers. The aging policy deficit across the nation will likely get baby boomers organized in political activism as they have demonstrated throughout their lifespan.

Per age stratification theory, older adults born in different periods define their strata, and important historical factors shape their aging experiences (Phillipson 2007). Ascribing universal attributes to a generation, however, is problematic. As the first post-war cohort to reject their culture's traditional values, the baby boomers tend to think of themselves as a special generation; indeed, they are wealthier, more active, and more physically fit than any previous generation of older adults (Coleman et al. 2006). Driven by this cohort, old age may now be emerging as a period of considerable positive human development as opposed to a period of decline. Becoming "old" seems to be happening in new ways. Age-related mortality and dramatic declines in health have been decreasing since World War II (Withnall 2002).

The members of the boomer generation engage more often in meaningful social activities than previous generations of retirees did, and they maintain close

relationships with friends and people around them. It is social participation, including meaningful activities and friendships, which are considered important components of successful aging (Rowe, 1997). Shifts in work and employment, as well as in community leadership roles, augment the possibilities for older people, who in the past may have experienced less social integration. Such opportunities change the nature of education for the baby boomer cohort as they are entering retirement. Cultural and social conceptions of aging and old age as a distinctive period of the life course are undergoing substantial change. Thus, existing theories of age and aging will need to be re-conceptualized (Rowe, 1998).

The baby boomers are instrumental in challenging and questioning inaccurate assumptions about old age and aging. Their presence and influence in policymaking positions and their participation in the community have already changed how older adults are portrayed in newspaper stories, film and particularly in advertising. Although earlier stereotypes of old people represented them as being comical, tenacious, eccentric, for example, those images are replaced by more positive images where they are now powerful, affluent, admired activists and in some cases even sexy (Gubrium, Holstein 2002). Often, the advertising

images use age as a metaphor for tradition and quality one can trust. The baby boomer cohort has always been influential in creating policies fitting into their life course. It is expected that this will not be different as they move into their later years of life (Hodge, 2007).

Given the increasing numbers of older adults in the United States, and across the globe, especially in the developed world, commercial enterprises are increasingly marketing to them as an important if not a central demographic group (Coleman, 2006; Tempest, Barnatt & Coupland, 2002). There has been a large expansion of leisure activities among older persons, products, and services geared largely or exclusively toward older people. We see the formation of organizations for the over 50 years old, providing adult education and post-retirement education, physical training facilities, gated communities for the middle-aged and the elderly are established; we see Viagra commercials, and other lifestyle supporting drugs solely focused on the older adult. Cruise ship vacations, spas, city break holidays, plastic surgery, even magazines and radio station solidly catering to the older adult 50+ are readily available (Magnus 2009). Such targeting toward older adults is a phenomenon nobody could have imagined 30

years ago; it shows how a positive view of aging has already transformed the way baby boomers live, mostly in unmistakably positive ways, benefiting from prolonged life expectancy. Although the boomers as a group are already large and growing, the group as a whole, irrespective of those of minority status, is one of the wealthiest, healthiest, and most active in human history (UN 2009; WHO 2002).

Successful aging

There is no consensual definition of successful aging in the aging theory or the scholarly gerontological literature. With quite some variability of the term and interpretation, successful aging is often associated with the absence of disability or ill-health. Havighurst (1963) engaged in very early discussions on successful aging. He focused on the behavioral view and the interpretation of social roles on older adult's life adjustment and satisfaction but eclipsed disengagement and activity theory, both competing perspectives at his time. In the theory of successful aging, activity theory plays a more prominent role and implies, except for the inevitable biological and health changes, that older people

have the same psychological and social needs as middle-aged persons. Decreased social interaction results from the withdrawal of society from the elderly and is not concurrent with the desires of most aging men and women. In fact, the theory believes that staying active and resisting social disengagement helps older persons to age successfully. In the relationship between activity levels and life course satisfaction, personality type plays a particular role, to the extent to which individuals remain able to integrate emotional and rational elements of their personality into both, the activity and life satisfaction. When describing patterns of aging and predicting the relationship between the level of activity in life course satisfaction, personality seems to play the pivotal dimension, but activity theory does not consider personality satisfactory (Havighurst 1965).

Rowe and Kahn's (1998) seminal work introduced the model of successful aging with the argument, that successful aging is multidimensional, including the upkeep of physical and cognitive function, engaging in social and productive activities, seeking to avoid disease and disability mainly motivated by the individual's effort and assuming personal control over one's later life outcomes. The model defined successful aging through three major components: 1.

Maintaining a high cognitive and physical functional capacity, 2. active engagement with life, and 3. a low probability of disease and disease-related disability. Rowe and Kahn's conceptualization of successful aging (1987, 1997, 1998) and their theoretical model, made a critical contribution creating a strong empirical base, promoting health practices and behaviors in old age. It remains influential in conceptualizing aging and is very widely cited in mainstream literature and scientific inquiry. However, considering a life course perspective and the beliefs of critical gerontology in our thinking, successful aging models must bring into line micro and macro level issues the life course necessitates. Rowe and Kahn's formation of the successful aging model eclipse on prior thinking about disengagement of older adults in later life (Johnson & Mutchler 2014) and has a sole focus on late adulthood, making a static assessment of an individual's successful aging at that point. The model does not capture developmental processes, the trajectories of continuity and life changes in function over time.

Focusing on success in the aging process, defined almost exclusively by Rowe and Kahn (1998) as an individual's own choice and effort to maintain good health status, may underestimate the role of, e.g., social, economic status,

race, and gender, influencing health and developmental life opportunities in old age. The model of successful aging may fail in parts because it does not take into account social structural and environmental forces. The equation of good health with successful aging and poor health or disability with a failure in successful aging does not recognize the many ways in which individuals cope with emotional and physiological challenges accompanying aging. Health and activity alone cannot be a measure of success in old age. Models of aging must include transformation as older adults learn to accept what they cannot change and as they learn innovative ways of living needed in the life course. A life course perspective would take into consideration to be dynamic, bearing in mind adult developmental processes, the importance of relationships over time and history beyond a static snapshot at a certain age although life course perspective would work in concert with Rowe and Kahn's model. The term successful, particularly in a youth-driven and competitive society may not be capable of illuminating the positive moments that offer promise, despite the uncertainties in the later years of life. Brandt (2012) and Hank (2011) offer convincing evidence that success and aging outcomes are not necessarily accessible for all older adults

as discussed in their national study on income inequality. Other aging well predictors on an individual level are race, financial adequacy, gender, and educational attainment (Hank 2011; McLaughlin et al. 2010). Although the evidence that structural factors affect aging does not contradict the role, the human agency plays in the life course perspective. The older adult's self-engagement does not outweigh socially constructed opportunities and constraints. Family, the workplace, houses of worship, schools, for example, as institutional forces and aspect of the macro environment and social structure, shape older adults lives and their aging process. The structural opportunities the institutions offer heavily enhance the older adult's health and well-being (Riley 1998).

Considering the fluid nature of the life course and necessary changes across the entire lifespan, and the development of a life course perspective, positive aging can be portrayed as an ongoing developmental process requiring individual efforts as well as societal support. Elder, Johnson, and Crosnoe (2003) suggest that several aspects of the life course perspective contribute to being a valuable utility when considering the successful aging model. A life

course perspective facilitates the understanding of life outcomes and the development of effective prevention or intervention approaches because it views aging as a lifelong process (Berkman, Ertel & Glymour 2011).

Furthermore, a life course perspective must include cultural, historical and social context to support a long view of development in aging with an emphasis on process and change over time, highlighting growth and adaptation across the entire lifespan. Dannefer (2012) discusses a distinction in perspective of how individual action and social forces can shape aging outcomes.

In contrast, Rowe and Kahn's model only describe the physical function as a key characteristic of being successful in aging and their concept relies too heavily upon an individual's action and choices made. A broader perspective would acknowledge that diverse aging experiences must lead to varying understandings of success in aging, culturally and individually. We must consider community engagement and individuals linked life's as social beings and their adjustments to social networks, contrary to the Rowe and Kahn static frame of behavioral preferences. Rowe and Kahn's model, with the emphasis on personal agency, was still welcome in the academic discussion as aging was discussed and

characterized by inevitable and irreversible loss of capacities and decline, but the model could have promoted more positive views of aging (Dillaway & Byrnes 2009). Central to the life course perspective, as it describes development embedded in social-historical conditions that change over time, is historical time itself. As Dillaway and Byrnes (2009) describe, the neglect of historical time is critical because it creates risks of promoting definitions or operations within the successful aging model to be historically bound and not suitable for individual life course development.

When McLaughlin et al. (2010) use the definition of successful aging suggested by Rowe and Kahn in their study, they found a significant drop in rates of successful aging outcome between 1998 and 2004 evaluating the U.S. Health and Retirement Study. As rates of chronic disease and physical impairment rise, the number of older adults meeting the successful classification set forth by Rowe and Kahn declined by 25% over the time of the study. The finding is significant in light of current public health problems such as obesity and chronic cardiovascular problems with other obesity-related diseases.

The missing diversity and the heterogeneity in the development of successful aging is an issue emphasized in a life course perspective. The heterogeneity in the aging experience is tied to historical time. A growing proportion of the Hispanic and Latino population and their significance within the aging population supports this notion (Hilton et al. 2012).

Rowe and Kahn (1987) consider developmental influences launched before birth, such as genetics, as important to aging outcomes. It is also critical, in understanding late-life outcomes, how adult developmental potential and effectiveness of intervention target negative outcomes in aging, including considering environmental conditions and risks, for example, poverty, and how they are transmitted across generations in a family affecting adult development and aging (Ferraro, Pylypiv Shippee & Schafer 2009).

Positive aging

American society is undergoing a paradigm shift as the aging theory moves from a negative to a positive view of aging. No longer is aging seen solely as a period of disease and decline; rather, it is generally understood as part of the lifespan, a positive time of development and opportunities into late

life. Associating age with disease and inevitable decline can be better reframed by seeing aging as a social process rather than biologically. This point of view of aging is central to a critical perspective of positive aging because many experiences related to aging are rooted in social, economic conditions or inequalities older adults experience over the life course (Estes et al. 2001).

The positive aging movement is increasingly interdisciplinary as designers, architects, urban planners, health care professionals, and helping professionals become more deliberate in supporting positive aging at the individual, family, and community levels. In the past, those disciplines addressed the needs of the older adult within their respective knowledge silos. However, recent developments support the shift toward a positive developmental view of aging and the emergence of expertise on positive aging in the various disciplines. Scholars and professionals have formulated new models of aging, supporting the health and well-being of older persons and fostering their involvement in community life (Alkema & Alley, 2006). The scholarship on aging in the past decade has been characterized by a fundamental transition toward a positive and multidimensional view of the

aging process (Johnson & Mutchler, 2014). This shift is seen in the substantive literature on aging (Achenbaum, 2005; Gubrium, 2000; Gubrium and Holstein, 2002; Rowe, 1994,1999; Rowe and Kahn, 1998; Sugar et al. 2014; United Nations, 2007) as well as in methodological approaches to understanding aging over the lifespan (Davey et al., 2006; Lieblich, 2014; Walker, 2002). Sugar and her colleagues provide evidence for this paradigm shift with the increases of longevity, accompanied by better health among older people and the emergence of prolonged or redefined retirement. Longevity affords that we embrace the old age as the most significant human achievement in the gerontology of the 20th century (Cusack, 1999), and it opens new perspectives to develop gerontology in positive ways through the potential of older persons for growth and productivity through the end of life. Older people, particularly those with economic means in American society, are experiencing new options for self- development and personal growth and are seeking to advance their quality of life through activities once seen as only the province of younger people (Liang & Luo, 2012). Participating in further education is one of those activity options in positive aging that may emerge as a principal activity among

older adults.

Aging and living positively is not just something for the rich and the healthy, it is within reach of everyone even if they appear ill or handicapped from some perspectives (Seligman & Csikszentmihalyi, 2000).

My social constructivist standpoint nurtures the conceptual context from which my understanding of positive aging originates. The important hypothesis of my perspective is an explanation of the world, not demanded by the nature of the world itself. Context is actively negotiated, and collaboration with people is necessary to construct the conceptual context of it and in particular the nature of positive aging. It is the people operating in their social groups who create their own realities. Because of this, there is no one correct way to describe the world, regardless if it is in science or elsewhere. It is the generating of new ways of understanding, illuminating new patterns in aging models and because of that, it precipitates change. We have been, and the scholarly literature in geriatrics and gerontology supports the tendency, charting senescence and decline of human capacities over the life course. This notion is particularly and strongly represented in the gerontological science,

with a focus on the physical and mental decline (Holstein & Gubrium, 2000). It is the nature of Western civilization and Western culture to devalue older persons. One would not find this attitude in many traditional cultures, where older people are viewed as the wisest with the most life experience, and they are treated with dignity and respect. With this in mind, I must view the scientific literature of aging on decline as a cultural construct, and the reported research on deterioration of psychological or physical functioning, mainly of the oldest old 85 years and older, is not just a reflection of what is there, but a configuration which derives from the viewpoint of certain values. Holstein and Gubrium (2000) refer to the effect, to find someone biologically or cognitively impaired, a collaborative accomplishment. It is the particular assumption and the values within a complicit culture and a conforming particular professional group. In my critique of aging theories, viewing aging as a solid period of disease and decline in the tradition of Western culture, I must continuously reflect on how the sciences construct the life course and decline is viewed as a natural fact of growing older. Emphasizing on the constructed nature of aging theories, we come to understand the abilities to restructure the course of aging

and understand it in more positive ways (Hazan,1994).

Stemming from the traditional theories of aging, we can begin to explore more inspiring ways of understanding older age, find research that lends itself to an optimistic view and constructs and engages in discussions helping us to emerge new visions of understanding the latter years of life.

There is a growing number of scholarly literature with a constructivist view in place. Research has been done showing how older people today create life's that are full of satisfaction and meaning. With the sheer numbers of baby boomers retiring, some major shifts in the life course of older adults are taking place. Advances in the health sciences, health support, the political power baby boomer hold and the wealth they represent support the shift into positive aging. I feel there is evidence in the positive aging literature establishing several distinct life themes in aging for the boomers. Those themes are central to the positive aging process and the emerging positive aging theory of prominent themes as they are centered on the "self." Self is the theme evolving around self- enhancement in physical, psychological and social ways. Gilleard and Hicks (2015) call it the sybaritic lifestyle theme. Personal attractiveness rarely

available to older people in the past is now a major avenue to satisfaction in this lifestyle. Finding new ways to enhance sensual pleasure, maintaining a beautiful body, considering plastic surgery, facial lifts, expanding the knowledge of self-awareness and learning new skills or improving those already acquired are now the motivators for everyday life. Beauty for the baby boomer generation is a whole new aspect of positive aging and does not stop with the head and plastic surgery. A shaped body is in vogue and seems to be a whole new way of spending time for older people in their pursuit of well-being and happiness. Now a whole beauty industry caters to the demands of the older population not only beauty products and supplements but beauty ranches, gyms designed for older adult's exercise classes and workout rooms in workplaces and hotel rooms, catering to the older person. Spiritual tranquility and physical fitness as a result of shifting positively in the thinking about aging has gained wide popularity (Magnus 2009). Such self-development also includes education programs in a variety of education levels, self-development workshops particularly geared towards the older adult physical training and educational programs at community colleges or universities. The self-seekers among baby

boomers choose to participate in parties and get-togethers, matchmaking websites particularly designed for older adult, adventure holidays and so forth. The baby boomers as the major group of older people are now controlling large economic resources and even 15 years ago accounted for one half of all discretionary spending thus have become a desired market focus (Onks, 2002). All this supports positive aging and marketing is using older people representing a vision of retirement that already attracts younger persons looking forward to turning into that stage of life (Gubrium & Holstein 2002).

One important element in positive aging theory is, older adults engage in the cultivation and maintaining of social relationships. Depending on the older person's life stage, an important focus is placed on family, from intimate to extended, and then more loosely to friends, distant acquaintances, and neighbors. Family connections and the joy of life celebrating family, or maybe only the sticking together in tough times, help to create a positive attitude (Johnson & Barrier, 2002). For some older persons, the creation of new social networks may come from new employment. Many of the baby boomers do not enter into traditional retirement but, as one indicator of the positive aging

movement, re-enter the workforce through full-time or part-time jobs. Older adults re-enter work for social as well as economic reasons. (Dychtwald, 1999). The positive aspect of having a place for recognition and integrate social life among co-workers further supports the experience of positive aging.

The sybaritic lifestyle may be the driver for the involvement of older adults in their communal networks, and part of civic clubs or the Chamber of Commerce, religious organizations, educational institutions or in charitable organizations of their communities, far into old age. Because they are not as much involved in their occupational lives anymore, they have more time available to serve these organizations as a volunteer. More older adults are engaged in volunteer activities in the United States than any other group (Magnus, 2009). It is their vast experience, there a long history of involvement making them the leaders in their communities. In return, they experience pride, fulfillment, self-efficacy in their volunteer role and a golden opportunity to make a difference. The need to feel useful and productive is particularly important at an older age when other occupational opportunities have ended.

Traditionalist values to Western culture divide the lifespan into three

phases: developmental, maturity, and decline. Positive aging has largely abandoned the concept of developmental closure as the phase ending the life course. The end of employment and the empty nest offers an abundance of continued adult development (Gergen, 2010; Levenson & Crumpler, 1996).

With time and resources at hand, there seems to be no limit to personal growth and fulfillment in the later years of an adult. This notion of personal development is also supported by individualist values central to the Western traditions, where the individual serves principally to society, contributing individual knowledge, responsibility, and morality (Levenson & Crumpler, 1996). All can play into themes of positive aging by cultivating self-knowledge and pursuing pleasure. Moreover, the individualist tradition can foster various patterns of well-being in later life, all centered around self-development.

Kahn (2002) has noted that the individual themselves have to maintain their physical and mental capacities, and that “research on successful aging and its biophysical determinants would encourage people to make lifestyle choices which would maximize their likelihood of aging well, that is maintaining a high

quality of life in old age” (p726). This implies that institutional and social structural interventions are not involved (Riley 1998).

Traditional aging theory focusing on decline and disengagement and some gerontologists and scholars claim that positive aging is not within reach for most older adults. Those scholars argue that thriving in old age; one must have wealth and health (Lee & Kim, 2003; Picone, Uribe & Wilson,1998; Smith, 1999).

In contrast, many sociologists have discussed the relationship between wealth, happiness and a positive outlook. Those relationships are very weak (Jinkook & Hyungsoo, 2003). While wealthy people tend to be satisfied with their life's, poor people tend to be so too. Wealth by itself does not create happiness. However, it is true that extreme poverty contributes to feelings of poor well-being (Myers, 1993; Argyle, 1999).

It is also questionable if good health is essential for positive aging. Good health may be a matter of conflicting opinion, and the term is negotiable. Communities of the elderly develop their standards and points of view what

counts as poor health, and those definitions are usually not shared by a young adult. Many older adults would not use their bodily condition to judge their well-being (Frederick & Loewenstein, 1999) and physical condition is not as important as it is often constructed in traditional aging theory. It is the creation of positive meaning from a constructivist perspective, that is required for a positive aging experience. If one gives up life or desires in the life course due to the pressure of social order, it is essential that one possess resources to resist and to create meaningful alternatives. As I will discuss later, education may make important contributions as such a resource. For the older adult, the importance of the educational experience is not so much dwelling on knowledge, the educational experience is more likely opening pathways of interest and value. Ways of aging can be full of challenges of all varieties, rich in interest and vigor. Positive aging is not focused on the inevitability of death, and potential decline and not everyone over the age of 60 is a patient. Positive aging emphasizes the focusing on self-fulfillment, communal contribution, and emotional independence. I would also include that meditative and contemplative traditions are included as nurturance in the later years of life. Entering the later

years of life can create new conditions of desire memory reflection and thoughtfulness, and the new sensitivity can enrich the meaning of one's life.

In conclusion, positive aging and the life course perspective emphasize on aging as a lifelong process, historical times, culture as primarily a place, social structural forces, institutional forces, contextual influences on adult development, heterogeneity, and social-personal influences on health and well-being. Positive aging does not rely on being disease-free, though such a condition is likely beneficial to all. Social engagement may still depend on an older adult's interest, their preferences, and their mobility (Hank 2011). An older adults own perspective necessary in formulating philosophies of aging well, and Havighurst's thoughts on the continuity of adult development and the life course uphold that older adults will still add to their life as they age. If they can maintain their lifestyle preferences, they will perceive aging in a positive light (Havighurst 1965).

The analysis of the baby boomer, a cohort within the positive aging scholarship, may offer more insight into homogeneity and cultural differences.

The baby boomers have been known to take matters into their own hands.

Their life course perspective already identified positive aging as an ongoing developmental process which requires individual effort and societal support.

Such efforts could usefully expand into identifying and developing policy, supportive of positive aging, a dynamic view of the nature of the life course, as well as considering lives of old and the oldest adults as important as they change across the entire lifespan (Dannefer, 2012; Hank 2011).

Retirement shifts

Unclear attitudes about the baby boomer's retirement or the boomer's current workforce plans will raise many questions, particularly how this will affect society and its economic well-being in the coming 10 to 20 years. It is foreseeable that the baby boomers will not have the same retirement plans their parents demonstrated, and trends already show the baby boomers current notions of retiring. Some retired baby boomers already have more than one career and will take on new careers just for the challenge or the entrepreneurial pleasure (McNair 2007). It is projected that in 20 years' women and minority men will constitute two-thirds of the then workforce. Without a significant

policy change or development and implementation, many baby boomers, particularly women and minorities will keep working long into their older years in order to make means ends. This inequity will have sound effects on our culture (EPF, 2003). The transformation of retirement is the result of trends in labor forces as well as behavioral changes and attitudes of baby boomers towards career and traditional retirement. Walker (1996) and Phillipson (1998) explored how the meaning of retirement has changed. Phillipson notes that retirement evolved from a period of stability in the 50s and 60s when it was clearly associated with an exit from the workforce to a phase of considerable instability and loss of identity for people who are post work. The age at which people decide to leave the workforce is dependent on a variety of factors, for example, redundancy, health problems, caring for older parents, severance or maybe self-employment. Increased longevity and the change in the balance of life stages with considerable social and cultural outcomes, may also carry into decision-making for retirement (Blaikie, 1999). Baby boomers are now retiring develop a new kind of retirement lifestyle, and their emphasis has shifted from issues of sickness and decline toward consciously maintaining good health and

a sense of liberation (Phillipson, 1998). This change is rooted in the emergence of consumer culture, particularly as businesses become aware of the demographic trends and shifting into a more mature market. Many baby boomers will stay in the workforce longer as discussed by McNair (2007) given demographic trends that show fewer younger people coming into the labor market. Some older employees may wish to continue in the workforce because they cannot afford to lose their income. Others may just enjoy the challenges their work provides and the camaraderie the workplace offers. As McNair points out, many will seek opportunities for part-time jobs or other kinds of work after they reach official retirement age, or seeks self-employment or fulfilling voluntary work. He also noted that the transition from working into retirement has become more drawn out as baby boomers choose to withdraw from work only gradually or to take on new roles or activities once they have left full-time employment. Hodkinson et al. (2008) confirms that observation and sees retirement as a process with a lengthy transition that includes a series of changes over time. Their observations, however, lack clarity as to when that transition truly starts and finishes. Bolles and Nelson (2007) raise an interesting

question to be addressed, and that is “what life will I retire to?” rather than “what work will I retire from?”. With this change of perspective, it will not be longer adequate to see older people as those who have left the workplace.

More baby boomer is retiring at earlier ages, fewer are below the poverty line, and by the time they do retire, they may be relatively better off financially than their children (Magnus 2009). As baby boomers move into retirement and the aging population is expanding, traditional gerontology scholars and policy planners still tend to focus on the decline and degeneration which they associate with aging. Traditionally very little attention was paid to the years in retirement, with no focus on potential growth and development in old age.

While activities with family and friends are important in the early years of life, and within the lifespan perspective, the hallmark of maturity is personal autonomy, retirement redefines the structure of life. Some may be free again to return to the joy of emotional interdependence and redefined relationships. Many older adults may find the years in later life an opportunity to ride the individualist demands for autonomy in favor of reconstituting social

relationships. Although the individualist tradition is focusing on developing the self and empowerment, the envisioned individual relationships with others are secondary. During their occupational life, many may find that the demands of work and family will leave very little time to help others outside of family circles. With retirement may come an opportunity to reconstitute this notion. The idea of positive aging entails the great joy of dedicating time and energy to making the world a better place.

To some people, aging may mean the emergence of new interests or the development of interests that have remained dormant throughout the lifespan. As people age, they leave what society considers to be the “active” or “productive” years (typically defined as a time that includes family formation, child rearing, and involvement in the world of work), and they may wonder “what next?” This kind of personal interrogation can reveal numerous unfulfilled interests, present new possibilities for engagement in the world, and prompt a search for new ways of investing in or developing the self. Some older adults, of course, continue in the vocational work that contributed to their identity in their younger and middle years. However, new possibilities can

emerge, such as an interest in writing, creating artistic works, teaching young people, or changing society through social activism. The assumptive base guiding my research is positive and developmental – it speaks to the possibilities that older people now have for personal development.

Growing in place

A useful theory of positive aging must recognize cultural variation and acknowledge potential cultural bias. The life course perspective underscores the importance of place in human development and aging. The attention to place highlights elements at a macrolevel influencing aging outcomes (Hank 2011; Brandt, Deindl & Hank, 2012).

The positive aging movement is increasingly interdisciplinary as designers, architects, urban planners, lawyers, health care professionals, and helping professionals become more deliberate in their support of positive aging at the individual, family, household, and community levels. In the past, those disciplines addressed the needs of the older adult within their respective knowledge silos. In past decades, environmental design for older persons (Morton & Soldo, 1992; Verbrugge & Jette, 1994) was often coterminous with

the “barrier-free design” movement, which reinforced the assumption that older adults are people with physical disabilities who navigate their physical environments hesitantly and uncertainly. The notion of barrier-free designs for older persons shifted only in the early 2000s to the universal design paradigm, which conceives of the older adult as part of a positive and inclusive environment. Universal design does not focus exclusively on disability, but on the qualities that make buildings, neighborhoods, and communities accessible and usable for all, while recognizing the age, gender, spatial, and cultural preferences and functional needs of users (Lidwell, 2003). The original notion of “aging in place,” wherein older adults remain in their residence after the home has been remodeled to accommodate their physical needs, is now considered much broader under the positive aging paradigm and inclusive of the neighborhood and even the entire city. As boomers attain the traditional age of retirement, ever more of them are becoming politically active in their demand for communities and “places” that value their elders (Anderzhon, Hughes, Judd, Kiyota, & Wijnties, 2012).

Indeed, the universal design already is addressing how environments

can support positive aging and facilitate the necessary sensory experiences, cognitive processing, physical functioning, and social involvement of elders in positive and purposeful ways (Kopec, 2006). This movement suggests that part of the decline we associate inherently with getting older is essentially embedded in the environment.

With robust and competent environments that can accommodate or compensate for considerable variation in human functioning, people who are aging can prolong their autonomy and independence with considerable dignity (Leibrock & Harris, 2011).

Chapter 2

Literature Review

Lifelong learning

The relationships between lifelong learning, educational gerontology, education gerontology, geragogy, aging, and education policies on aging are complex. There is no generally accepted definition of the concept of education for older adults, nor is there for learning in later life. However, learning in later life has been recognized as a meaningful concept in the literature in supporting

positive aging. Aging can become a period of rich personal fulfillment and social contribution. In other words, engaged elders can augment a society's wisdom. (Withnall 2000, Jarvis, 2001, Finsden & Formosa, 2010, Hafford-Letchfield, 2016).

Geragogy, to me the closest term in the literature referring to the learning of older adults, is not the only term used in the literature to describe the learning of the elderly. The spectrum to describe the education of and by the elderly, if it is based on social relations, increases in well-being, self-actualization, human development, and continued learning of the elderly, is broad (Hartford 1978). It encompasses educational gerontology (Peterson, 1976; Glendenning, 1984, 1987; Ruth, Sihvola, & Parviainen, 1989; Long, 1990; Cusack, 1999), geragogy (Battersby, 1987; Glendenning, 1992; Formosa, 2002), and education gerontology (Lemieux & Sanchez Martinez, 2000). Agruso, (1978), Glendenning & Hamilton, (1996), and Glendenning et al. (2000) examine the teaching in later life.

With the shift of aging models into a positive aging paradigm, changes may occur in the sense how society will think about education embedded in the life course, about the relationships between education and individuals as well as to

society, and the thinking about social welfare for marginalized society members (Galuske, 2009). We tend to see learning and human development as a vertical process, implementing higher levels of knowledge or competency. I prefer the emancipatory ideas of Paulo Freire (1972) in adult learning or andragogy, embracing learning within a social-cultural context. Freire constructed a perspective of “sideways” or horizontal learning and development (Engstrom 2009) complementing the traditional vertical thinking of education and learning. It implies that education is something much broader and more complicated. When taking this into account, I choose to use the German term “Bildung.” There is no equivalent translation of the term into English, not uncommon with so many other German philosophical concepts. *Bildung* is contextually used in pedagogy, but also in other disciplines. It involves physical and psychological development in context with the development of motion and biological kinesis, social engagement, the natural or lifeworld, and historical image. *Bildung* also means the individual possibility, the individual processes of development, and the other persons and institutions, necessary for the individual’s development of social processes (Habermas, 1986, 1992;

Sorenson, 2015). This affords to consider *Bildung* as a building block to education, implicating anthropological and biological facets. A person needs social relationships to develop because society is only understandable through environmental factors such as relationships between individuals and people's needs and society provides opportunities for development in relation with others.

Additionally, I believe in Faure's concept of learning societies, where he suggests learning involves the wide breadth of a learner's life, in the sense of time-span and diversity, all of society, inclusive of educational, social, and economic resources (Faure et al. 1972). Learning societies can provide the basis and aspiration for "becoming," beyond an educational system. This is what I believe, education in late life is striving to be. Conceptually, geragogy could be the third in a trilogy of "agogy", which would locate itself with pedagogy and andragogy. This suggests that geragogy is not part of andragogy, the theory of teaching adults and concerned with the education of the adult learner. This point of view is discussed controversially in the scholarly literature of educational gerontology, particularly in critical educational gerontology. I

prefer the term geragogy over andrology to outline the long-life education of old adults, and the concept involves geragogical research, geragogical action theory, providing for the subjective dimension of older person's actions as discussed by Parsons (1977) and geragogical practice, which still must be defined in a metatheory. Lemieux and Sanchez Martinez (2000) offer an interesting viewpoint by placing geragogy in geriatrics. They separated the field of educational gerontology into two parts. Part one would represent geragogy concerning the instruction of older persons, presenting deficits. Which theoretically would be based in geriatrics. Part two would represent gerontology concerned with the description of learning of older adults, theoretically based on education.

To fully grasp the potential of education in later life, we must construct the meaning of learning, adult education, and theoretical understandings and applications from different epistemological platforms. It is of particular interest to me, as I construct theories of learning and their pedagogy from disciplines such as sociology, social sciences, educational philosophy, the psychology of aging, art, and humanities, the biology of aging and geriatrics. The multi-

disciplinary nature and relationships are widely demonstrated in the scholarly gerontology literature. This is important in the sense of creating a more holistic perspective in ways in which learning takes place in the later years. Older adults will locate their learning within their social, economic, and political context, to create the meaning of learning in later life as Freire has indicated.

Lifelong learning at the organizational level can be seen as a necessary tool to facilitate changes in the workplace or fields of practice. Learning in the systems of workforce development follows processes which enable workers to fulfill their potential, but at the same time enables organizations to evolve. Gould, (2000) and Hafford-Letchfield et al. (2008) describe those competitive environments as learning organizations. The learning organizations facilitate a connection between extending and disseminating knowledge to maintain and improving the standards of practice. Similarly, to the concept of learning organizations are the theories of humanist radicalism and reflective practice advocated by Jarvis (1992, 2001, 2006, 2009) and Schön (1973, 1983).

Here, the concept moves to “learning societies,” where learning occurs beyond formal educational environments, locating learning as a quality found

in individuals, but learning is also an important element of systems where the social and situational orientation toward learning is recognized. Edwards (1997) identified three key components around the idea of learning society. The discussion shifts from providing learning opportunities to one on learning. Roughly outlined, the first strand is the product of modernism committed to active citizenship, liberal democracy and equal opportunities where social policies create an educated society. The second enables institutions to provide services for individuals in a learning market, economic imperatives and individual achievements and is what we see today, the third has a typical postmodernist orientation and draws on a wide range of resources enabling members of the learning society to adapt and enable the support of their lifestyle practices. It is one in which learners adopt a “learning to live” (Edwards 1997).

Increased discussion in the scholarly literature of education and educational gerontology in the past decade is concerned with the analysis of education policy relative to lifelong learning. In particular, the concern is the relevance of lifelong learning for contemporary thinking about education.

What lifelong learning theories, methodologies, and methods should be used and what questions should be asked in the analysis of education policy. Should we ask important questions about the effects of lifelong learning, drawing on a Foucauldian analysis, as a true discourse and of questions of it regarding its truth or totality? What is the meaning of policy questions over the meaning of its constitution and what is the significance? Moreover, what are the effects of lifelong learning as totality and truth? (Fejes & Nicholl, 2008). The questions remain largely unanswered. Policy and educational analysis in the past have always identified and discussed various research approaches regarding the meaning of policy and lifelong learning that they produce. I argue a more critical approach to policy and learning in later life is necessary in order to accommodate the positive aging model. Lifelong learning policy in its original stage, traced back to the Faure Report (UNESCO 1972), has formulated the philosophical political concept of a democratic, humanistic and emancipatory system of learning opportunities for everybody, independent of class, race or financial means, and independent of the age of the learner (Schuetze, 2006). Lifelong learning by its definition is lifelong and breaks with the traditional

front-end model of education. However, the model could also be life wide and centered on learning as opposed to the traditional focus on education and educational institutions. The assumption is that everyone should continue to learn throughout his or her lives. The concept of life wide learning would consider that organized learning would occur in many different ways and a variety of settings outside of educational institutions and inside educational institutions, but lifelong. If we understand learning as a process of becoming, then learning, both formal and informal, is an inevitable and integral part of the process. This raises the question if it is the individual's motivation, capacity, and responsibility to engage with learning, or if a life wide education policy, supporting a learning society, create the framework. All of which, of course, depends on other factors within people's life (Deakin, Crick & Wilson 2005; Lambeir, 2005).

The concept of life wide education comes with a moral dimension. We start to see in the writings of educational gerontologists and the emphasis on older people's right to have access to educational opportunities throughout their lifespan. This raises the important question of what older people are entitled to

expect in their post-work life (Withnall, 2002). Laslett (1984) and Glendenning (1985) both tried to raise awareness and interest in this issue through the Forum on the Rights of Elderly People to Education. Additionally, Finsen (2005) notes the belief that older people should have a right to educational opportunities in later life had substantial work undertaken by the Older and Bolder program, initiated by the National Institute for Aging and Continuing Education (Withnall 2007). Carlton and Soulsby (1999) argue, since people now in their later life, experienced the divides of gender and class with a major impact on the division of educational opportunities, older people should be entitled to educational opportunities as compensation for lack of these educational opportunities earlier in their lives.

With positive aging becoming more salient, we have marked a turning point in thinking about education opportunities for older people. Generally speaking, education in later years offers and discovers possibilities of self-actualization of older persons. There is one imperative of critical educational gerontology, and that is empowerment. In a way, educational gerontology, or geragogy, has a critical liberation role in educating older adults (Battersby,

1978). Critical educational gerontology has advocated the development of praxis of geragogy that would emphasize education is not a neutral enterprise but would encourage older people and educators to question their roles (Glendenning & Battersby, 1990). The ideas of Glendenning (2000) and those of Battersby (1993) have resonated with some adult educators in how critical educational Gerontology might be explored in practice. Formosa (2002) has proposed a set of principles for the practice of critical geragogy based on earlier ideas by Battersby but is careful to point out: “critical geragogy is neither a system nor is it reducible to any fixed set of prescriptive models. It can only open a frontier of liberating education, which then must be reinvented in a sensitive manner for actual situations, in our terms, and our discourses”.

When thinking about lifelong learning in respect of choices older people can make about their learning in later life and considering their overall educational experiences, geragogy as a framework facilitating the education of older persons will face new challenges while shifting into long-life learning.

The aging of the world’s population

The United States Census Bureau reports the population in the

United States aged 65 and older has recently grown at a faster rate than the total population. The total U.S. population increased by just under 10% between 2000 and 2010, but the population of those 65 and older increased by more than 15% during the same period (U.S. Census Bureau, 2009).

It is likely that the population of people aged 65 and older in the United States will account for 25% of the total population by 2025. The cohort of those aged 85 and older, often termed the “oldest old,” is projected to increase from roughly five million in 1990 to 25 million in 2050. Adults aged 85 to 89 are the largest segment of the oldest old. Given these projections, the education of older adults will likely emerge as a salient focus of gerontological practice (Hussar & Bailey, 2009). Education as a social institution follows demographic trends. As a result, environmental factors are likely to become more important in the education of older individuals, given the very real issues that accompany aging, including changes in health, perception, and cognition (Lester, 2002). In light of the shift to a positive view of aging, I argue that older people are striving for positive development in their older years. Aging as a physical, cognitive, social, and cultural phenomenon has been widely researched, and

education in later years of the life course has already been identified as a contributor to well-being and health (Hafford-Letchfield, 2016; Schaie 2005).

Although gerontologists have inquired into aging as a physical, cognitive, social, and cultural phenomenon, positive aging as a desirable goal, and life-long learning as a contributor to well-being while aging positively has only recently emerged on the gerontological research agenda. For me as an environmental designer, the relationship between the physical environment and the person is of paramount interest. As a Certified Aging in Place Specialist (CAPS) I understand the needs of the older person to negotiate their physical environment successfully in their settings. The need for the older adult to adjust their built environment is well studied and expressed in what is called the “Environmental Press Theory” as well as the scholarly literature in environmental gerontology. Environmental press involves the forces in the environment that together with individual need, evoke a response (Lawton, 1982; Wahl & Weismann, 2002; Kendig, 2003). Research has already indicated that those environmental adjustments are successful for the elderly’s purpose-built housing designs (Regnier, 2003) and may be applicable in physical education settings.

The relationship between positive aging, geragogy and the nature of learning spaces in which older persons can be successful in pursuing their educational interests is not well understood. A better understanding of such relationships could enable educational settings, for example, institutions of higher learning, to develop programs and learning environments specifically designed for the old learner and help to form or enlarge multi-generational cohorts of learners. Such understanding could improve the opportunities older adults have when pursuing their educational goals, and could guide educational institutions in creating settings conducive to the learning interests and needs of olderadults.

The nature of aging is changing due to advances in medical care, expansion in recreational and avocational options for older adults, and the emergence of second and even third careers. As a result, learning in later years and even the pursuit of formal educational degrees may become increasingly important for older individuals who are seeking to sustain or advance their life satisfaction (Merriam, 2007; Mroczek & Avron, 2005; Schuller et al., 2004).

The media commonly report stories about older individuals who are active and

engaged in activities once thought to be reserved for young people. Likewise, given the demographic increase of older adults in the United States and across the globe, especially in the developed world, commercial enterprises are increasingly marketing to older adults as an important and central demographic group (Coleman, 2006; Tempest et al., 2002). Older adults have a growing interest in encore careers, and I assume the need for colleges and universities to provide access (Alboher, 2012; AARP, 2000; Tinto, 2007, Withnall, 2010).

Considering positive aging forming a relevant paradigm, questions of education in old age and the settings supporting further education into late life have become more noticeable. Positive aging by itself may encompass self-advocacy and serving as an advocate on behalf of the needs and public policy and aging issues older persons have (Faber, 2014). Advocacy requires one to remain informed and educated about public policy concerns and issues involving older persons and society. In order to remain informed, one needs to be a life wide learner beyond the traditional model of lifelong learning, extended into the later years of life. The traditional paradigm of lifelong learning has been challenged by the baby boomers were learning is

already much more adapted as integrated model embracing learning, work, recreational activities and advocacy involving real contexts and authentic settings.

Life-wide learning draws attention to the fact that organized learning occurs in many ways in a variety of settings outside and inside educational institutions. This raises questions about the nature of knowledge and skills if acquired outside of a traditional educational institution, how might individual learning be assessed and recognized. Supporting the focus on learning is the older adults motivation to learn, and the capacity and perceived value to engage in learning, (Deakin, Crick & Wilson 2005; Lambeir 2005)

The realities of a growing older adult population group which is expected to increase rapidly until 2050 (U.S. Census Bureau, 2009), likely will create increased interest among gerontology researchers and geragogy practitioners in structuring and test educational options for older people. Recent surveys by AARP (2006), Civic Ventures, (2013), and Merrill Lynch (2013) indicate that most older adults may retire with a redefinition of the traditional concept

of retirement. The majority of those aged 55 to 79 plan to stay engaged in some form of work or the traditional work place, volunteering community service, or learning activity. This finding has obvious implications for older adults' educational involvement and the design of appropriate educational settings, even though these individuals may balance their educational endeavors with retirement from formal employment.

As a designer and a humanist, I have focused on the involvement of elders in various forms of education. As an affiliate faculty member in the Osher Lifelong Learning Institute (OLLI), a national program that makes non-credit, non-degree seeking education available to older people, I have observed firsthand the strong interest that many elders have in continuing education, particularly those who have faced health challenges and/or want to sustain their cognitive functioning into older life. My informal interactions with OLLI participants have revealed the considerable variation in their educational interests. Some seek educational opportunities to enhance their lifestyle; others wish to expand their knowledge about topics related to their health and well-being, and yet others aspire to attain academic degrees and credentials, develop

avocational skills or prepare themselves for new careers. For many elders, it appears that educational opportunities are drivers of self-fulfillment in the older years.

I find it remarkable that so little literature has been published about the educational preferences and experiences of older people, their educational goals, the kinds of educational programs they seek, and the attributes of environments or settings to support their educational aspirations. As an interior designer and environmental gerontologist, I find in the little literature guidance on how to approach the creation of educational settings that are responsive to the learning experiences and preferences that older people seek out. I do, however, understand why such a gap exists in the educational practice knowledge base: American society is only now coming to see aging in positive terms, and education suggests societal investment in human development. As I contemplate the positive aging movement as a designer, I see great potential for educational activities to have a positive influence on human development in the older years. Why, after all, should education stop when young adults transition into careers? How does andragogy, what Knowles (1999) referred to as the

education of adults, influence the possibilities for education as an institution in the later years of the human life span? Moreover, how do elders come to see educational opportunities for themselves regarding preferences, desired experiences, and ultimately regarding their educational goals?

Despite changes in the official rhetoric of lifelong learning and the keen elevation of the concept of active aging in the scholarly literature, older people still tend to be ignored in educational policy circles as I have discussed. Still little is known about older people's experiences of education and of learning over the course of their lives, the factors that might affect whether they choose to learn, during their work life or in their later years.

Environment

Concepts of environments designed to welcome older people, including the older person into a community, and foster their well-being are salient in the social inclusion movement. This movement seeks to broaden the scope of inclusion so that people are not excluded due to factors of age, socioeconomic status, identity, ethnicity, race, and geographic location. This is especially

important for elders, whose involvement in their community is essential to their autonomy and helps them contribute to society (CSI, 2009). Environmental gerontology seeks an understanding and means of analysis of the relationships between the older person and their physical and social environment. This offers opportunities for modification and interventions in optimizing those environments. With this support, aging can become a period of rich personal fulfillment and social contribution. The possibilities of greater longevity and the compounding of social experience may elevate social intelligence within a society. In other words, engaged elders can augment a society's wisdom. To maximize these possibilities, it is important that educational environments for older adults take into account the very real issues accompanying aging, including changes in health, perception, and cognition.

Seymour Sarason posits the pivotal role of settings in fostering innovation in human development, and the setting is a key component in the creation of inclusive environments. In his seminal book, *The Creation of Settings and Future Societies* (1972), Sarason suggests that the basis of social practice is the creation of new settings in which people thrive. Social settings

can fulfill older adults' educational preferences and desired experiences, and, therefore, they are a factor in my work as I consider how interior and environmental design can support educational options and programs for older people. Understanding the creation of settings facilitates an exploration of how older individuals' educational aspirations, interests, and goals influence their preferences for the design of learning environments.

Social scientists and designers have studied educational settings extensively. A few pertinent examples from the K-12 environment include the design of special education classrooms to include children with autism and the design of mainstream classrooms to include children with disabilities (Friend & Bursack, 2014; Hocutt, 1996; Polloway et al., 2001; Spencer, 2007). My previous research investigates learning settings for K-12 students and higher education students of traditional college age (Wachter et al., 2010, 2014; Holiday et al., 2014). However, the existing literature has not investigated the design of learning environments reflecting older adults' educational aspirations, interests, and goals. When searching for research about educational settings for elderly people, one finds that the relevant literature focuses mainly on the existing

models of retirement homes and senior assisted-care living units. This reflects limitations in our understanding of what constitutes an appropriate educational setting for older adults (Hiemstra, 1972; Kim & Merriam, 2004).

Social constructs of race, gender, and social class, although not fully defined in their relationship to the life course perspective, are key influences on a person's environment and their aging. An older person's status or position in society can shape their immediate environment, access to health resources or good medical care and on a macro-social structural level, opportunities may not exist for all older adults. Consequently, social class may lead to disparities in disease prevalence, frailty or other health indicators (Holstein & Miller, 2003; Crimmins, Kim & Vasunilashorn, 2010). Also, life course scholars still have to describe the influences of institutional structures and policies have, regulating behavior and providing resources when older adults encounter risks across the life course (Leisering & Schumann, 2003). When scanning the scholarly literature in environmental gerontology regarding theoretical discussion, I conclude that the past 40 years have yielded high in worldviews of environmental gerontology, and low in translational research and application

productivity. The reporting on modification or optimization, description, and the related analysis between the older person and their environments is rich (Lawton, 1977, 1982, 1983, 1999; Scheidt & Windley, 1985; Wahl, 2001) and identifies Powell Lawton as the central figure in environmental gerontology. Undeniably, the theoretical argumentation which Lawton developed in 1983, and his research supportive of the role the environment plays for persons of old age, remains current and persuasive. The field as a whole and the influence on aging processes and outcomes demonstrate diversity regarding the range of research approaches, themes, and concepts. Parmelee and Lawton (1990) have raised concerns for the need “to move the field beyond its current languishing state.” In reviewing the translational achievements of environmental gerontology, and this is particularly true for physical, educational environments, Parmelee’s and Lawton’s diagnosis has yet to lead to a considerable outcome.

Concluding research questions from the review

Emerging social movements legitimizing positive aging in which education becomes an important opportunity for elders. Because the intersections of environment, educational gerontology, and interior design are

only just emerging, the literature is limited and not always focused on the diversity of educational interests and possibilities existing for older people. I am interested in the elderly's educational interests originating from their educational aspirations and forming their educational goals, and the preferences the elderly have for learning environment qualities and to explore relationships and how they inform the design of learning environments fulfilling the elderly's learning aims. From a practical standpoint, I believe that such illumination can factor into the design of learning environments specifically for older adults.

With positive aging as an emerging framework, shifting the previous paradigm in which aging is seen as a period of decline, the proposed research will expand understanding of what constitutes potential educational settings for older adults to include those settings associated with universities, community colleges, vocational-technical schools, municipal libraries, community centers, church classrooms, and online learning environments. For my proposed research, I sought to understand how far older persons intend to pursue such activities (e.g., learning to stay attuned to current events, learning as an expression of socialization, formal learning, etc.), not to be confused with the educational

goals those aspirations can influence (e.g. understand political decisions, make a friend, get a college degree etc.).

The underlying assumptions motivating this research are: Older persons have specific educational interests, goals, and preferences for accommodating learning environments that emerge from their prior experiences and their educational aspirations across the lifespan. Positive aging enables people to form a Life space in their older years for the pursuit of new educational goals linked to their educational interests. Among older adults, there is a growing interest in encore careers, and most post-secondary and higher education institutions will increasingly recognize these interests and provide access to a variety of settings (Appendix D). Older adults will assign to their educational interest considerable priority thereby imbuing educational opportunities with importance for them during a period once reserved almost exclusively for retirement. The developing questions are:

1. What do distinct age cohorts of the older adult's report as their educational interests and goals and what do they identify as the issues, challenges, and barriers they face in realizing them during their older years?

2. To what extent do educational interests and goals originating in the older adult's educational aspirations influence their preferences for learning environment qualities?

Chapter 3

Methodology

Introduction

Qualitative research philosophy. The study was conducted using qualitative methodology with the aim of answering the research questions and achieving the study objectives. Moreover, this study was conducted as an interpretive study. This qualitative research focuses mainly on the expressed meanings generated by individuals being studied and the interpretation by the researcher.

Creswell (2013) stated that “qualitative research is used to explore and understand the meaning participants (individuals or groups) ascribe to human or social problems” (p.49). Furthermore, Silverman (2011) indicates that qualitative research majorly concentrates on the general meanings and experience that people develop from their individual experiences with the goal to understand the real

meanings and nature of people (Cohen, Manion, & Morrison, 2013). Qualitative data is more exclusively revolving around the personal insights and the narratives that have been collected directly from the respondent of the study. Such data, however, must be valid enough to be considered authentic. The interpretation and the analysis of the qualitative data from the narrative of the participants can be done by several processes (Silverman, 2011).

Qualitative data can also be based on the secondary data, such as field notes and observations, which may have been collected by the interaction between the participants of the study and the researcher (Irvine, Drew & Sainsbury, 2013). The study design is influenced by the type of data that holds the views of the respondents (Irvine, Drew & Sainsbury, 2013). Therefore, the collected data must be aligned with the narrative and the insight that has been collected from the interview participants.

In the design of this study, I follow an interpretive paradigm, which uses the experiences of certain events of the participants to construct the data. I will understand the participant's views as well as interpret their narrative exploring the lived experience of older adults and their goals, motivations, and aspirations

toward their educational experiences. The interpretive methodology also provides an understanding of how the study participants perceive learning environments as lifelong learner coming to age. Interpretivism explains experiences through the individuals own subjective worldview. The method allows gaining in-depth insight into individual meaning and motives with the aim to let participants tell their story. Semi-structured interviews, allowing for complex, multiple understandings, participants observations, and beliefs allow the individual shaping their narrative, and tell their own story. Individuals are intricate and complex, and different people experience the same objective reality in different ways. Individuals have their very different reasons for acting in the world. The aim is “verstehen” or empathetic understanding. Seeing the world through the eyes of the actor doing the acting with the understanding, this will sacrifice reliability and preventiveness for greater validity.

Through qualitative inquiry and a thematic analysis of interview transcripts, I will better understand the “bigger picture” of the older adult’s educational interests and preferences and what they identify as the issues, challenges, and barriers they face to fulfill their educational interests.

Furthermore, I will understand the preferences for learning environment qualities and how the educational interests of older adults influence those preferences. Both research questions will involve qualitative methods in narrative inquiry.

Constructivism. As a constructivist, I seek to use the findings of the inquiry to challenge the initial conception of designs of learning environments for older people. My present worldview and existing theoretical lens, as elaborated by Creswell (2013), is congruent with his definition and qualification for the use of qualitative inquiry. For Creswell, qualitative research can guide an exploratory sequential developmental approach, in which the qualitative data collection and interpretation will lead to the illumination and understanding of the educational interests and the learning environment preferences of older adults who seek formal and informal education activities. This approach allows a focus on a thorough understanding of the context surrounding a phenomenon, defined by the stories expressed in the interviews.

Bruner (2009) notes constructivism as a paradigm or worldview that knowledge creation is an active, constructive process. The researcher is an information constructor. Individuals actively construct or create their own

subjective representations of objective reality and new information is linked to prior knowledge, thus mental representations are subjective. Knowledge is constructed based on personal experiences and hypotheses of the environment while each person has a different interpretation and construction of knowledge processes.

This study design is constructed within a poststructuralist paradigm, viewing the research participant's cultural setting inseparable from the meaning of their experiences. As described by Silverman (2011), such studies are usually lengthy but hold the advantage of allowing the researcher enough time to collect all the relevant information through interviews and observations useful to the study. Creswell (2013) did use the expression "thick description" to illustrate the value of lengthy data collection within the poststructuralist paradigm.

Narrative research. Much of the narrative research development and emerging traditions is credited to the contributions of Clandinnin (2007), Andrews, Squire, and Tamboukou (2008), Labov and Waletzky (1967, 1997), and Bruner (1988, 1990). Current scholarly literature provides many definitions of narrative research; some are near other forms of qualitative inquiry with

difficulty to draw a clear distinction. Generally, it is understood among scholars that narrative research is concerned with a focus on narrated text presenting a live story, either a whole life story or certain aspects of it.

According to Geertz (1988, 2000) narrative research is a mixed approach of integrating systematic analysis or the narrated experience with the hermeneutic analysis of meaning. Scholars began to use the subjective, narrative construction of individuals who shared stories about their lives in scholarly qualitative research inquiry. Collecting data began to take the form of a conversation in which the research participants shared personal stories on a particular subject that the narrator had experienced. Those stories are not evaluated by their factual or historical accuracy. They are used to understand the research participant's identity and culture. Narrative research accepts that participants understand their lives in a narrative form, where the story has events at the beginning, points at a middle and an end (Sarbin, 1986). In the stories told, participants represent their meaning-making in the context of which the narrative intersects with other events in personal life, including context to other factors such as relationships, family or community. The

relationship between the researcher and the participant is an interpretive enterprise where the researcher guides the conceptual framework aiming to explore human experience represented in a story. The narrative truth is the constructed account of experiences, and its interpretation is grounded in hermeneutics, phenomenology and literary analysis. Following a strict methodological regime often gives way to flexible approaches allowing to capture the lived experience of participants with the emphasis on their meaning-making (Andrews, Squire, & Tamboukou 2008), It is the stories within narrative inquiry that reveal participants views and gives the insight to understand their lives. Those stories are typically attained through interviews around the joint subjectivities between researcher and participant.

Narrative interview is a relationship between the interviewer and the interviewee and must be conducted with the greatest openness and respect. The interviewer in the narrative research is opening a subject that is meaningful to the narrator but represents the study question or questions, and then the researcher listens to the interviewee and their construction of the topic with minimal interruptions. Furthermore, the role of the interviewer is to contain the story

empathically without evaluation and with patients towards the narrator's silence (Josselson, 2013; Weiss, 1994). Narrative research is an inductive process: first, a research question needs to be formulated which can be adequately explored in a narrative. Then open-ended interviews will be conducted in which the research participant narrates their story. The researcher is using the story through reading analysis and interpretation to reflect on the research question. Interviews can be held one interviewee at a time or within a small focus group. A researcher would most likely record the conversations in order to utilize the interview material for narrative research and then later transcribe it. The transcription of the narrative can be looked at through holistic reading (Lieblich, Tuval-Mashinach & Zilber 1998; Wertz et al. 2011), or by conducting an analysis focused on themes and categories (Josselson 2013; Charmaz, 2011). Charmaz (2011) points out, that when approaching the thematic analysis, it is important to look for emerging themes and not only search for the themes previously hypothesized.

Confidentiality and ethical considerations are of utmost importance when writing about and sharing personal narratives. Research participants should receive the written-up conversations with the right to introduce corrections, additions or

omissions (Sinnot et al. 1983). In narrative research, the scholar and the research participants are in a relationship of two subjectivities. The researcher would be required to be reflexive and examine with great care both, the narrators and the researcher's attitudes, pre-positions and the influences on the research process (Wertz et al., 2011). Active listening requires respect and understanding of the narrator as a human being, in happiness or pain, and as long as the participants tell their stories, they are the expert, and the scholar will learn from them, their history, wisdom, and opinions (Josselson & Lielich, 1996). If the narrative is constructed in a focus group, participant observation research can be considered, a method often used in anthropology. The researcher must attempt an understanding and reach out to gain a close and intimate familiarity with the individuals in the focus group through involvement and participation in their natural setting. This usually requires an extended period of time. The combination of participant observation with narrative research is a particularly productive methodological approach (Jorgensen, 2015).

Research design

Through qualitative inquiry and a thematic analysis of interview transcripts, I will better understand the “bigger picture” of the older adult’s educational interests and goals and what they identify as the issues, challenges and barriers they face to fulfill their educational interests. Furthermore, I will understand the preferences for learning environment qualities and how educational interests of older adults influence those preferences. Both research questions will involve qualitative methods which will increase my insight into (a) participants’ educational interest; (b) their aspiration they arrive from and the educational motivation to seek education, (c) their principal and specific educational goals, (d) the benefits they want and anticipate deriving from their involvement in educational activities; (e) their current plans to engage in education; (f) the scope and content of their current involvement, (g) the current issues, challenges, and barriers they experience or assume.

According to Kothari (2014), research design refers to the conceptual organization/structure within which the study is carried out. It involves an outline for the method, collecting data, and data analysis or interpretation.

Sampling procedures were based on simple, purposeful sampling methods.

I employed the use of the purposeful sampling technique to select participants from the target population. The sampling unit in this research are members of the Osher Life Long Learning Institute (OLLI) at the University of Oklahoma cohort. Olli was founded by Bernard Osher and programs at Colleges and Universities are funded through an endowment by the Bernard Osher Foundation. The Foundation supports programs at more than 120 Colleges and Universities in the United States. The programs offer non-credit courses specifically developed for older adults aged 50 years or older who are interested in learning for the joy of learning. Olli does not provide degree plans or structured curriculum. The programs promote lifelong learning and personal growth. The Osher Foundation funding requires that programs meet an initial 500 member goal. Members pay an annual membership fee and an additional course fee. Courses are developed and taught pro-bono by University Professors. They typically chose the course topic and submitted a course proposal to OLLI. Accepted courses are offered to the members through a published course catalog and the courses, called Senior Seminars, typically include six to eight single classes taught once a week.

As it is illustrated by Silverman (2011), qualitative research majorly concentrates on the general meanings and experience that people develop from their individual experiences and those are expressed in the narrative of the face-to-face interview.

Although I involved a relatively limited number of participants, I collaborated with each one to enrich their perspective on their educational aspirations, interests, and goals and then their environmental preferences by not considering myself as an expert in this substantive domain, but as a learner who encouraged each participant as an expert. Each participant assisted in the development of a framework for understanding the implications of a person's educational aspirations, interests, and goals for their learning preferences, and for the formation of educational settings they find relevant and meaningful.

Research questions

1. What do distinct age cohorts of the older adult report as their educational interests, aspirations, motivations, and goals and what do they identify as the issues, challenges, and barriers they face in realizing them during their older years?

2. To what extent do educational interests, motivations originating in the older adult's educational aspirations, and goals influence their preferences for learning environment qualities?

Participants. An initial email invitation (Appendix B) to 530+ members of the Osher Life Long Learning Institute (OLLI) at the University of Oklahoma cohort invited and identified participant's, their age group and gender. I sampled purposefully from this convenient sample into a group of 24 participants, considering their age range and their gender. The sample divided into the age range groups of 50 years to 60 years old, 61 years to 70 years old, 71 years to 80 years old and 81 to 90 years old. An equal number of female and male participants were selected into the age range groups. Twelve interviews were conducted until information redundancy had been reached. After twelve interviews, narratives seemed to repeat themselves concerning themes aligning with the study assumptions and research questions. Purposeful convenient sampling refers to when a researcher is selecting individuals who happen to be easiest to access as participants of a study according to the needs of a study (Creswell, 2013). By sampling purposefully, a researcher selects participants that

have a broad knowledge of the subject matter studied. This study is concerned with exploring the educational experiences and aspirations for lifelong learning older adults may have. The Osher Lifelong Learning Institute provides a perfect platform to reach participants serving the purpose of the study. Adequate sample size in qualitative research is often a matter of judgment. Too small of sample size may not support the claims of the study or to achieve the information redundancy or saturation sought after, and too large sample sizes may inhibit deep rich case-oriented analysis.

The research questions do not magnify age or gender. The conceptual study design leaves those two factors open, and they may become of interest in the study while constructing the understanding of their education experience, understand their milestones and how participants nominate importance to their educational goals, and aspirations and motivations to participate in life-long learning.

This cross-sectional study aimed to find the prevalence in the narratives of issues around educational aspirations, motivations, and goals toward learning in later life reported by this group of older adults. The study design involved one

interview contact with the study population. Scholars describe cross-sectional as one which includes a proportion of the population who share similar characteristics but differ in their variables of interest (Wisdom, Cavaleri, Onwuegbuzie & Green, 2012). However, the proportion of the population in this study cannot be representative to the entire population being studied, because this qualitative study design is not aiming to generalize findings, rather reveal education experiences of older adults with resulting narratives which help to explore the participant's educational interests and the educational preferences they nominate.

The involvement of OLLI participants in the research will enable me to illuminate their educational experiences, inclusive of both formal and informal avenues of learning that the elders prioritize as meaningful to them.

The overview of the participants is shown in Table 1. The recorded age is the participant's age at the time of the interview. Although all participants agreed in the consent form to be quoted directly and to be mentioned by their name, I decided to code the names for my coding iterations and analysis to avoid as much of bias distraction as possible. I replaced participants names in

the write-up with aliases. The names I used are from the list of the 2017 most popular names recorded with the social security administration (SSA 2017).

What I mean with bios distraction, and what I argue is that any hermeneutic analysis will be influenced by the researcher’s life experiences and the “snapshot” impression the interviewer has from his or her interviewee and how an understanding of experiences is constructed.

Table 1

Participants overview

Participant Code	Participant Alias	Gender	Age
210	James	M	70
220	John	M	66
230	Mary	F	59
240	Robert	M	55
250	Jennifer	F	83
260	Michael	M	69
270	Linda	F	66
280	William	M	69
290	Susan	F	84
310	Nancy	F	75
320	Joseph	M	74
330	Betty	F	58

Table 1

Instrumentation and data collection

I administered the semi-structured interview to the selected participants face-to-face. The interview questions are formulated based on the study objective and the research questions. Each interview took approximately 60 minutes or until terminated by the participant. I captured the respondents' own words and phrases. The interviews were audio recorded, and additional field notes and observations were taken.

In the semi-structured interview script, I considered the issues, challenges and barriers they identify for their educational interests, the motivations the interviewees hold to participate in education and the aspirations they have and I investigated the preferences for learning environment qualities that the participants perceive as hindering or as contributing value to the achievement of their educational goals. Interview questions included the background variables indicative of the elders' previous work history, education, income, age, and gender, which likely mediate the relationships among elders' educational interests and their preferences for learning environment qualities but will be open enough to allow for the

participants narrative (Appendix C).

The participants had a choice of the interview setting and most invited me into their home, sharing with me that the location of their choice will be more comfortable and familiar to them. The invitation to the interview, however, suggested using a classroom at the Osher Life Long Learning Institute in Norman.

Each of the twelve interviews yielded a transcript and I coded each transcript to identify relevant themes and subthemes concerning the educational interest participants nominate as meaningful, along with his or her educational goals, his or her motivations, and aspirations and the participants learning environment preferences.

Planning the interview.

After obtaining Institutional Review Board (IRB) approval, I began to recruit participants in my personal network and through The Osher Lifelong Learning Institute. I taught several years for the Osher Lifelong Learning Institute in the “morning with the professor” program and regular classes in the six to eight-week terms. Through that work, I knew quite a few Osher students. The Osher Lifelong Learning Institute Executive Director allowed me to recruit

through their member email list. My initial email explained the intent of my study and had the consent form attached. I asked for participants 50 to 90 years old, who are active in their community, live at home [not assisted care], are interested in life-long learning. I suggested to meet at the Osher Life Long Learning Institute, and I asked if they prefer if I email them with details or if they would accept a phone call from me. I received 63 answers by email providing their consent to participate in the study and a phone number to call them for details. I organized the information about the participant in a spreadsheet with contact information, gender, and age (range 55 to 84). After organizing the participant's information, I coded the names and selected the first ten participants. If a participant did not answer the phone or indicated that they would not be available for a while because of illness or travel, I went on to the next participant code.

When preparing the interview, numerous aspects came to mind. I was reflecting on the issues that could impact the subject of investigation. Can I clarify the context of the study to the interviewee and would the understanding of the study questions influence in which order I guide the questions? Would the language I employ, the barrier of language when using academic terminology, and

my foreign accent or mispronunciation of words influence the interviewee’s approach to their narrative? How would the failure of recording equipment, the setting of the interview and the physical comfort of the interviewees influence their openness to the research questions? Will my physical appearance, my understanding of self and how I relate to the questions I will ask to affect the level of trust the interviewees will bring toward me?

When I contemplated the conceptual questions of the interview script, I was guided by the research questions. The description of my question to the participants and the questions near the lived experience of the interviewee derived from the nature of the semi-structured interview as illustrated in Table 2.

Table 2
Interview questions framework

Conceptual question	Description - recruitment question	Experience – near question
education experience	Share your education experiences now as older adults or if you like as far back as you like.	What is the “good, bad and ugly” in your education milestones?
education aspiration-motivation-goals	What are your education aspirations, motivations and goals you have as older adult? Can you define them?	Do your previous education experiences direct your current education aspirations, motivations or goals? Are they connected?
preferences for learning environments	Do your previous education experiences or	what do you experience as comfortable or

	your education aspirations guide your preference for learning environments?	uncomfortable in a learning environment? Include space, navigation, furniture, etc.
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Table 2

When preparing the recruitment questions, it is advisable to prepare a subset of what Lieblich (1998) calls auxiliary or pocket questions.

Such auxiliary questions are not part of the “regime,” unless or until the interviewer needs them and the interviewer should not treat them as interview schedule. Auxiliary questions are open ended questions. Lieblich (1998) further suggest using simple language in the interview questions.

I was prepared to match the parlance of the interviewee without losing being genuine. It is not helpful in the interview process and for the interviewee to craft their narrative if I did not offer them clarity and if I use words the interviewee would not understand or if I create an atmosphere which would make the interviewee feel less important particularly because some may have preconceived ideas about academics (Krumer-Nevo 2002). Providing the question description is telling the participants in simple ways what interests me in the study.

Schön (1990) suggests we cannot be taught an analysis or interview process without going through and learning the process ourselves. As the interviewer, I am holding on to two tasks. The first tries to answer why I am doing the interview, what am I interested in to illuminate guided by the conceptual questions of the study. Second, how do I manage my interaction with the participant. The engagement with the interviewee is relatively short but requires trust from the interviewee and the building of a relationship with the interviewee must happen in a relatively short amount of time. I argue that my role as an interviewer at the time of interviewing has more weight than my role as a researcher until the interview is completed. Keeping the participants comfort level, my concerns for the participant and my compassion and following where the interviewee wanted to go, precedence over following my conceptual questions in a strict protocol. Paying attention to and asking the little conceptual questions near the interviewee's experience and perhaps then going back to pick up the conceptual question was always a preferred option. It is important for my process to move together with the interviewee, though lead them. I always had the understanding that it presents a fine line to give the interviewee room to construct

their narrative, even with some sidetracking to the research questions. This tracking of one another harmoniously helps the narrative to unfold seamlessly. One must understand that interviews are not ordinary conversations. Interviews are in a way a meeting place in the knowledge of another person and the awareness of the interviewee. The interviewer will walk along with the interviewee to get to that place (Lieblich, Truval, Zilbert 1998). The quality of knowledge from the interviews depends on the artisanship of the researcher to prepare the interview protocol. The quality of gained knowledge also depends on the understanding of self as Kvale (2003) points out. Understanding of self or self-awareness is described as how my observations and interpretations are being (or might) influence or impact the interview interactions. Self-awareness appears to be an important component and an effective tool to understand what I bring to the interview situation. I argue we must accept that unconscious factors may play a role in our interviews, whether we are aware of them or not (Schulz and Schulz, 1994). This is also supported by Schön (1990) and is part of our capacity to reflect on our own unconscious motivations. In line with my constructivist approach to research, no information about a person exists without a relationship to that

person. In the qualitative research interview, the researcher him or herself is a “research instrument” (Lave & Kvale, 1995).

Race, age and gender are fixed, and I have to agree with the presented assumptions these demographics raise. What I wear is what I control and I it influences what I will signal. Age differences can be sensitive. Those differences are apparent in self-presentation and are likely signaled with questions from the interviewee, embedded in their narrative. I encountered such differences with questions if I, although similar of age, would understand the interviewee’s experience. The posed questions included:

“I don’t know if you are old enough to remember ..” or

“I don’t know if you ever experienced ...since you did not grow up here.”

My respond always was that I am interested in those narrative nuances because of our differences. My presentation must always expose that I am aware of differences and that I see the interviewee as the expert of their lived experiences with me capturing their narrative, thus enhancing my knowledge of them in interpreting the conceptual questions. Self-presentation also refers to dress and speech. Choose what your wear appropriately. I argue that appearance matters. An

interviewee might wonder, “is this person like me?” “how does this person fit into my category of people.” Interviewees might worry about social status differences or, in the case of my study, if they have “enough” education” to report on in their narrative. An interview by an academic might feel intimidating to the interviewee (Lomskyu-Fedder 1996)

In addition, speech can signal social class, or mark educational attainment. I argue a researcher must understand him/herself with self-awareness in the human interaction of qualitative inquiry and interviewing. The qualitative research interview is more than an instrument. It is a combination of theory, the craft technique and the understanding of self. (Schulz and Schulz 1994). This must be learned by embracing the task of learning to interview and perhaps learn about ourselves in that process.

Starting the interview. It is critical not to set a pre-determined direction or implied expectations before the interview begins, instead orient the interviewee. The interviewee needs to be granted the trust and the time to develop the narrative along the lines of their own lived experience. It is equally important to find a starting point for the interviewee’s narrative with a question near to the

interviewee's experience. To guide the interviewee, the conversation can start with:

“I am trying to learn about...”

Reassure the interviewee that whatever their experience is or what occurred to them is just fine and is a valuable contribution to the narrative they are creating.

Time effort. Each interview, in general, lasted about 1 hour. Three interviews lasted close to two hours. I communicated with the interviewees at the beginning of the conversation that the interview will likely last one hour or less, but if they want to talk longer or go into more depth, they sure can and should not worry about the time.

“It is hard to predict how long an interview will actually take and You should not feel you are rushed through the interview.”

The place. I suggested meeting the interviewees at the Osher Lifelong Learning Institute in a classroom or the lobby. I also left it open to the interviewees to meet at any other place they prefer, including their home. All but one interviewee preferred to have the meeting at their private home. One interviewee wanted to meet in the lobby of the Osher Lifelong Learning Institute.

In the interview, the participant apologized for not meeting at home and shared concerns that it might have been too inconvenient to me to drive out into the countryside where the home is located.

Orienting the questions. I started each interview with reminding the interviewee how we have come together, my relationship to the Osher Lifelong Learning Institute, and my first email inquiry to them. I then continued with my recruitment question conventionally. Sometimes interviewees wanted to know more about my intentions and what I will do with the study outcomes or what I hope to learn from their narratives. It was crucial to find a good moment to transition between our conversation and posing the initial question, passing the conversation to the interviewee and to let them start building their narrative.

While the first part of the interview orientation is geared to organize and to align the relationship and the interviewees and my interest, the second part following those first exchanges, is responding with interest and acceptance, so to signal the interviewee my intentions to follow his or her lead. Many times, interviewees offered me a full roadmap of their lives, including many aspects of their relationship and other family experiences. If I was able to, I determined the flow

of the conversation by asking the interviewee to elaborate. Once the interview is on its way, the interviewer is in the role of the active listener, inviting details of the story and elaborations. The interviewer must stay empathetic and alert for any disruption of the conceptual questions (Seidman 2006). A good interviewer will spend as much time as possible to listen to the interviewee's experiences.

Sometimes this is accompanied by silence. Generally, silence is to be gaged not to be too long or too short. The right gage is to encourage for the interviewees thinking and talking. An interviewer must be willing to sit for a moment and wait until the next thought in the interviewees narrative emerges. If the interviewee realizes that the interviewer is listening and thinking, they likely will continue with their story. At a critical point, the interviewer may ask if there are other or additional thought about the conceptual question or the experience near the question. This will indicate that thinking is a critical part of the narrative (Seidman 2006).

Formal consent. While submitting the proposal for this study to the internal review board at the University of Oklahoma, I included a formal consent form (Appendix A)

The formal consent form was the first in-person task to build a relationship with the interviewee. I softened the formality and the bureaucracy of the consent process by linking myself to the process, at the same time pointing out the University's mandate. If there were no concerns or questions, we went on with beginning the interview. After I received a consensus, I set up two digital recording devices and used a digital tablet for field notes. I opted for two recording devices in case one of them fails, or a recording file is scrambled or corrupted.

Criteria of goodness. Rigor and quality of a study are essential to the research process. Without a rigorous approach, research will lose its utility (Morse, Barrett, Mayan, 2002). By reviewing the literature, one can discover an extensive debate about the definition of a good quality study. The scholarly discussion, besides goodness, includes trustworthiness, validity, the appraisal or evaluation of goodness and the look at possible criteria or standards guiding the quality of a qualitative study. Morse, Barrett, and Mayan (2002) and Caeli (2002) argue that a qualitative study has to show legitimation to demonstrate validity. Koch (1994) relates legitimation to demonstrate the legitimacy of knowledge and

demonstrate rigor, which he relates to validity. Generally speaking, there is no consensus on how to achieve legitimation, and contradictory approaches are apparent in the qualitative methodology literature (Guba & Lincoln 2005; Armer, Rivaux, Bell 2009). Some authors urge for a common language for qualitative practice and an overarching framework of quality, rigor, credibility and so on. A researcher should clarify the quality principle markers employed, stating how a study constitutes a significant contribution or demonstrates credibility and worthiness (Tracy 2011). Miller (2008) and Armer, Rivaux and Bell (2009) argue that all of the validity criteria can be obliterated because quality in qualitative research can be evaluated in line with a researcher's conclusions of their individual studies. It seems that controversy is part of the bigger qualitative research discussion. In my study, I was challenged to decide if I, in a very careful and thoughtful way, follow a list of established criteria from the literature and methods outlined in some textbook, or if I adjust and experiment, thus interpret to a methodology I would consider suitable approaching my data most creative and flexible. I aimed to avoid a pre-occupation with finding and then defending a method to look at my data, using pre-defined procedures, risking that the actual

substance of each narrative might be excluded through the procedures. Janesick (2003) identified such procedures as an idealization of the method. I argue, to achieve or to magnify understanding of the narrative is the ultimate concern in a phenomenological study. Van Manen (1990) radically concluded that the method of phenomenology and hermeneutics is that there is no method. Each phenomenological study or even each narrative may send the researcher's approach to the method in different directions as the researcher resonates on the context in interpretations or reflexivity while analyzing data.

Chapter 4

Coding and Analysis

Qualitative analysis depends on rich, thick descriptive data. The analysis starts while still making field notes, organizing and structuring data and transcribing interviews. Rereading transcripts, listening to interview audio and a relooking process through notes should happen throughout the data collection process (Creswell 2013). Qualitative data collection and analysis usually proceed simultaneously. I experienced an ongoing research journal, a collection of thoughts, doubts, and observations as a stream of consciousness to organize

thought and to expand knowledge, as a good tool to employ from the beginning of the study. Questions in qualitative research are answered with an emergent methodology. It is crucial to describe analytically what a participant experienced, rather than capturing a simulation of what we believe they experienced. Kvale (1996) argues it is equally important in the analytic process to not only note what was said by the participant, but also to read in-between lines what was said. Verbatims may not necessarily unfold all of the lived experience in an interview. Data analysis can advance in many ways in qualitative research. The process of data analysis can include the review of the researcher's analysis by the participants and consensual validation that the written description of the issues are accurate. Alternatively, the extraction of significant statements from the participant's descriptions with a following analysis of the meanings and then returned to each participant for validation (Creswell, 2013).

The narrative analysis highlights content and its meaning. The context in which the narrative is constructed gives important clues aiding the interpretation of the related experiences. In addition, reflexivity, the process of examining both oneself as a researcher, and the research relationship, requires the researcher to

regard findings as relative to his or her position as an observer or interpreter.

The analysis may solely rely on the insight of the researcher who immersed in the data through reading and rereading and revisiting the transcripts in a cyclical process to get a sense of the whole. The reading of the narrative can be attempted by reading holistically. The holistic analysis considers the story as a whole, and no part of the narrative is interpreted without considering the other parts. In a categorical analysis of the narrative, sections are analyzed in relationship to a category using coding strategies comparing similar text from other narratives.

Maxwell (1996) calls the distinction contextualization versus the categorization.

The analysis would yield a coding structure of the lived experience as a synthesis of all meaning units. The goal of this analysis approach is to reach an understanding of the lived experience through integrated statements about the experience, piecing together data, making the invisible obvious and deciding on the significant parts or a story. I argue that analysis here is a creative process of organizing the data in order for the analytic scheme to emerge.

Analyzing qualitative data in the interpretative framework is complex and time-consuming. Looking at the data from the non-experienced perspective opens

an opportunity to develop higher level insight which the participant him or herself may not have access to. The researcher must be careful however when applying insights developed in one setting to explain a phenomenon in a narrative from a different one (Denzin & Lincoln 2005).

Organizing and structuring evolving codes, keeping track of the interviewee's demographic data and my research notes and observations, I employed the qualitative research software MAXQDA. The software allows me to link collected data from the interview transcripts to my selected codes, the quotations, and my notes in a way which helps me to structure and summarize categories or themes more easily for the systematic analysis of the transcripts.

Over 140 hours of interviews were transcribed, evaluated and analyzed. Starting with my analyzing process of the transcripts, I employed the first pass of qualitative coding, the literature refers to this as open or initial coding, scanning the loose narrative structure of the interviews and giving each text segment of the transcript a code. This first, broad pass of open coding acts as a supportive scaffold to my data management processes and my subsequent analysis. It allowed me to get a "far away" view of what information is where in the

interview transcripts. Table 3 shows an example of my open coding management related to my conceptual questions.

Table 3
Open coding management

Questions	Codes
Educational History	
What do older adults report as their education aspirations?	Educational Goals and Aspirations
What are their educational goals?	
What are their interests in education and lifelong learning and education?	Preferences and Interests in Learning
How do those factors influence their preferences for learning?	
Preference for the design of learning environments?	Opinions on Learning Environments
What do they identify as the issues, challenges, and barriers they face in participating in education during their older years?	Current Issues, Challenges, and Barriers to Education
Given the educational aspirations, interests, and goals of older adults, what environmental qualities or affordances do they seek to support their learning in their later years?	

Table 3

The Education History example in Table 3 condensed the initial seven prompts (analysis questions) into five codes to better support the function of the

first broad pass and the condensation will support subsequent more detailed analysis. The semi-structured narrative format of the interviews rendered functionally similar responses to the paired questions in Table 3 when working from a structural view in MAXQDA.

Educational History Qualitative analysis is outside of and across all questions and codes in the 1st iteration because the individual histories of the participants are what undergird their answers to all interview questions and are discussed in length throughout the interviews. I began the interviews by prompting the participants to tell their story of their educational experiences as far back as they like to go, starting with their earliest memories of school to the present date, and a considerable portion of the interview is attributed specifically to recounting one's memories of school before the main body of questions is addressed.

For subsequent open coding passes, I established an iterative process of code schema generation, summaries of codes, extraction of themes, review, and reorganization of code schema (Figure 2). The first code iteration involved the broad codes from the interview structure and a summary of salient themes.

Figure 2

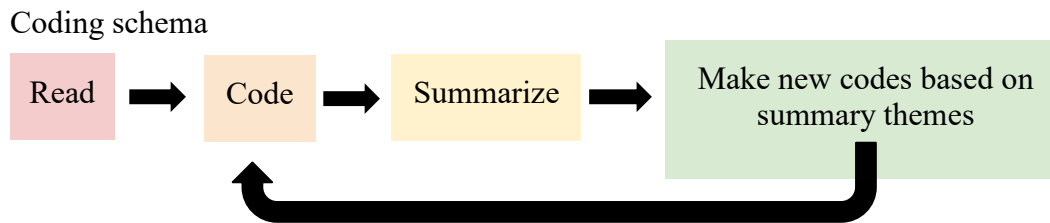


Figure 2

As a second step following this open coding process, I performed a close reading of the broadly coded transcripts with the intention of identifying salient and recurring topics. I wrote summaries of the topics and reorganized them into groups and subgroups. The identification of themes served as the basis of my coding schema.

I started with a set of keywords which I treated as hypothesis before analyzing the themes, and I used them as dimensions of exploration if the analysis confirmed their salience shown in Table 4. I compared these keywords with the topics and themes gathered from my first round of open coding for overlap, guiding the next round of coding. All the keywords except Entrepreneur remained in the schema.

Table 4
Keywords example

Keyword treated as Hypotheses
Social Inclusion
Entrepreneur
Healthy brain activity and well being
Lifelong and lifewide motivation to education
Lifelong and lifewide aspirations for education
Degree-seeking
Environmental learning conditions

Table 4

My first round of thematic (non-structural) second iteration coding began with the Environmental Preferences codes. I generated incipient codes based on the identified themes, with each code assigned sub-codes or ideas (dimensions) of what they might capture, and then I reviewed the transcripts again, reflecting if codes need to be adjusted for greater concision. The emerging sub-codes for Environmental Preferences are shown in Table 5.

Table 5
Environmental preference sub-codes example

Environmental Preferences sub-codes
Influence of past educational experiences
Features available in the building, preferred building conditions
Physical limitations
Duration/ time of instructions
Distance from home (the centrality of locations)
Number of students in class/ opportunities for discussion
Use of technology

Table 5

My first round of iteration involved focused coding (Saldana 2016) of topics, emphasized the research questions and written summaries. Detailed in Table 5, the active code schema has in many respects contracted and become more succinct, particularly regarding sub-codes. Motivations to Engage in Learning became an organizational parent code, encompassing ideas of both, newly iterated codes and codes derived from the hypotheses. Structure Supporting

Educational Aspirations was also limited. Some sub-codes were redistributed elsewhere while others had become analytically obsolescent and were eliminated. Motivations to Engage in Learning was functionally replaced with Barriers Toward Seeking Educational Experiences in the third iteration.

The third iteration code schema expanded to accommodate themes relevant to the questions and hypothesis by adding the new parent code, Life Milestones. This theme and sub-codes capture ideas that were not emphasized in the topical analysis but remain valuable in context. The complete second and third iterations and the changes from one to the next are detailed in Table 6.

Table 6
Second and third iteration themes example

2nd Iteration	3rd Iteration
<ul style="list-style-type: none"> • Opinions on the learning environment ○ Influence of past educational experiences ○ Features available in building/Preferred building conditions? ○ Physical limitations ○ Duration/Time of class ○ Distance from home (the centrality of locations) ○ Number of students/opportunities for discussion ○ Use of technology 	<ul style="list-style-type: none"> • Environmental preferences and affordances <ul style="list-style-type: none"> ○ Preferred environmental features/conditions <ul style="list-style-type: none"> ■ Use of technology ■ Duration of class ○ Physical limitations and needed accommodations ○ Thoughts on previous experiences and environments ○ Environmental impact beyond the physical space

<ul style="list-style-type: none"> ● Structure supporting educational aspirations <ul style="list-style-type: none"> ○ Structural freedom (following degree plan or interests) ○ Financial resources ○ Segregation in America (impact of racism on educational opportunities) ○ Institutional support towards a field (sciences vs. humanities) ○ Family(?) resources → access to childcare, etc. 	<ul style="list-style-type: none"> ● Barriers towards seeking educational experiences <ul style="list-style-type: none"> ○ Institutional ○ Historical ○ Personal
<ul style="list-style-type: none"> ● Social impacts on education <ul style="list-style-type: none"> ○ Opportunities for discussion (with professor or peers) ○ Social encouragement to seek further education ○ Opportunities to meet new people/develop new relationships <ul style="list-style-type: none"> ■ Intergenerational interaction opportunities ■ Have a rich social life ○ Education as a vehicle for change in social standing <ul style="list-style-type: none"> ■ Blue to white collar 	<ul style="list-style-type: none"> ● Sociability <ul style="list-style-type: none"> ○ Opportunities to interact ○ Social inclusion (cohort, peers)
<ul style="list-style-type: none"> ● Education as a resource for advancing career ● Education as a resource for improving self ● Mental health benefits of lifelong learning ● Degree-seeking ● Lifelong learning 	<ul style="list-style-type: none"> ● Motivation to engage in learning (throughout life and as an older adult) <ul style="list-style-type: none"> ○ For pleasure or self-gratification (or self-betterment?) ○ To improve career <ul style="list-style-type: none"> ■ Get \$\$\$ ○ To meet social expectations ○ Degree-seeking <ul style="list-style-type: none"> ■ Structural freedom ○ Positive aging (Mental health benefits of education)
	<ul style="list-style-type: none"> ● Life milestones <ul style="list-style-type: none"> ○ Inhibiting educational opportunities ○ Need to redefine goals or social status

	<ul style="list-style-type: none"> ○ Redirecting education to <u>lifewide</u> learning
	<ul style="list-style-type: none"> ● Interests in the subject matter of education
<ul style="list-style-type: none"> ● Interesting things to look at: <ul style="list-style-type: none"> ○ Perspective on children’s educational experiences ○ Self-efficacy (challenges overcome in previous education) ○ Gendered educational spaces/histories/experiences 	<ul style="list-style-type: none"> ● Other things to explore <ul style="list-style-type: none"> ○ Perspectives on children’s educational experiences ○ Self-efficacy in previous educational experiences

Table 6

The fourth iteration focused on axial coding (Saldana 2016) distilling themes and summarize coded. A search within the summaries confirmed the codes. I finally broke the Goals and Aspirations Code into three components; Aspirations, Motivations and Educational Goals, and summarized them.

I conducted a second search in the summaries and looked for new topics to investigate. I clustered segments as Aspirations (Table 7), Motivations (Table 8), and Educational Goals (Table 9) to understand them within the context of the narrative and how they relate to the lived experience of the participating older adults.

Table 7
Summary of aspiration

Aspirations	<p>SOCIAL LIFE</p> <ul style="list-style-type: none"> • have a developed and richer social life • fit into to social cohort (friends are all lawyers, so I want to be a lawyer) • to be a more interesting person • aspires to be more worldly <p>KNOWLEDGE</p> <ul style="list-style-type: none"> • enjoyment of learning new things • "self-knowledge aspirations" • to be knowledgeable • to better understand the world • to learn new things and broaden experience • to unlearn religiously biased previous education <p>MONEY</p> <ul style="list-style-type: none"> • to be wealthy (when younger) <p>LIFE</p> <ul style="list-style-type: none"> • to learn new things and broaden experience • improve life through acquiring an education • WORK <ul style="list-style-type: none"> ○ work somewhere that relates to a degree (nursing), take advantage of knowledge/education ○ to work in a field of personal interests • to be happy, fulfilling life (now as OA) • to have a family, to be a stay at home mom <ul style="list-style-type: none"> • to catch up on missed educational opportunities • to use education to avoid the draft (Vietnam) • no degree aspirations • plant the seed to initiate social/systematic change
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Table 7

Table 8
Summary of motivation

Motivations	<p>MONEY</p> <ul style="list-style-type: none"> • not aspiring to make a lot of money
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	<ul style="list-style-type: none"> • to find a career that would help support family • money not being a barrier, financial security enabling education • to get a job to support the family <p>SOCIAL</p> <ul style="list-style-type: none"> • for better social life • to have a better social life • enjoy being around people, interacting, making friends <p>ENJOYMENT</p> <ul style="list-style-type: none"> • enjoy learning, enriches the world • CURIOSITY <ul style="list-style-type: none"> ○ driven by curiosity • learning for the sake of it • enjoys learning • to learn new things, aware of changes (OA) • love to learn • self-driven desire for education • intellectual stimulation • to follow interests (OA) • to learn for the sake of it • I know I know nothing, learn new things • motivated by curiosity • to learn new things • the desire to guide own education, seek interests and curiosity • not to gain a degree or a skill set • the desire to follow interests, to guide own education • to figure out how things work <p>ENCOURAGEMENT</p> <ul style="list-style-type: none"> • parents encourage education (YA) • to follow role models that are well (self) educated • parents encouraging education (YA) • to follow the role model • family encouraging education • lack of encouragement from peers and authority figures to seek education (gender roles) • family encouragement towards a specific field/career (law) <p>CAREER</p> <ul style="list-style-type: none"> • use education to improve career • the desire to expand career • the new, advanced nursing program enables acquisition of RN/BS <p>MENTALLY FIT</p> <ul style="list-style-type: none"> • to stay mentally fit • to fill time, occupy the mind, fight boredom <p>OTHER</p> <ul style="list-style-type: none"> • the desire to avoid academic system/institutions
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	<ul style="list-style-type: none"> • to evaluate life achievements and opportunities • limited involvement in the field as OA • convenience of education • personal experiences in lower class guiding desire to improve life for people in lower class, empathy, availability of healthcare • to initiate changes in systems (healthcare) • to solve big problems in the world • break down tasks into achievable steps, make a clear path to goals • to use education to avoid the draft • to help people solve their problems, provide counsel or advice • education to learn about the field (understanding/competence, not grades)
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Table 8

Table 9
Summary of educational goals

Educational Goals	<p>CAREER</p> <ul style="list-style-type: none"> • to find a career • become lawyer • to become a nurse • to be a physician (YA) • to take classes that will help career • get another degree to advance career <p>SCHOOL</p> <ul style="list-style-type: none"> • to go to law school • to get a BS in nursing • to go to medical school • to learn about the law • go back and get Ph.D. (OA) • to finish an incomplete degree (OA) • to go to college • to get a masters degree in public health • to take full advantage of educational opportunities (previously denied) <p>MENTALLY FIT</p> <ul style="list-style-type: none"> • To stay healthy (OA) • to challenge self • to stay mentally fit (OA), stay active and curious • to stay mentally fit (OA) • try to prevent degenerative mental illnesses, <p>LIFE</p> <ul style="list-style-type: none"> • to find a new life partner • to fit into the social cohort (friends are lawyers)
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	<ul style="list-style-type: none"> • to have fun and learn new things • use education to become more worldly • to read all of the books they own • get involved in politics • to use education to avoid the draft
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Table 9

In addition, the fourth iteration uncovered love of reading shown in Table 10

Table 10

Summary of love of reading

Love of reading	<p>LOVES READING</p> <ul style="list-style-type: none"> • enjoy reading • like to learn and read • avid reader • enjoy reading on interesting topics • reading on topics of interests <ul style="list-style-type: none"> ○ reading on history and biographies ○ reading as a way to learn about world and other cultures ○ reading to expand personal knowledge ○ to feel educated ○ desire to know about as many things as you can ○ reads novels and newspaper • always read a lot • enjoys reading now (OA), not as a YA • reading not for educational purposes • reading multiple books • wants to read all of the books they own <p>KEEP MIND FIT</p> <ul style="list-style-type: none"> • to keep mind keen <p>ROLE MODELS</p> <ul style="list-style-type: none"> • older sibling teaching to read • role model encouraging reading <p>OPPORTUNITIES TO READ</p> <ul style="list-style-type: none"> • limited time for reading (for enjoyment) during career, retirement creating availability of time for reading and seeking knowledge • career limiting time to read for fun • retirement giving time to read <p>OTHER</p> <ul style="list-style-type: none"> • reading burnout from English degree
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	<ul style="list-style-type: none"> wishes they read more when younger
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Table 10

and perspectives on children's [the participant's children] educational

experiences. (Table 11) Topics not initially included in my study assumptions.

The milestone sunburst in the findings chapter (Figure 3) visualized that the later

was only mentioned by female participants. None of the male participants

mentioned their own children during the interview.

Table 11

Summary of perspectives on children's education

Perspectives on children's educational experiences	<p>VALUE OF EDUCATION</p> <ul style="list-style-type: none"> tells kids it's the best time of their life (college) Made sure kids had education since she didn't teach children value of education raising kids with emphasis on lifewide learning (alternate environments, world experiences, etc.) learning as more than school work emphasize to kids, the value of finishing college Reminds children that "these are the best years of your life." shared value of continuing education with children Parenting philosophy that "life was always about learning." Traveled with kids bc wanted them to "see totally different things." Daughters both want to participate in OLLI from seeing parent do it --> care about continuing education <p>THOUGHTS ON OWN EDUCATION</p> <ul style="list-style-type: none"> REFLECTIONS <ul style="list-style-type: none"> appreciation of college experiences child's education prompting memories of own education appreciation of college experiences growing up with undiagnosed dyslexia OPPORTUNITIES FOR <ul style="list-style-type: none"> Returned to school when kids grew up
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	<ul style="list-style-type: none"> ○ Kid is in school, so thinking about returning to school too ○ Took classes while children were in college ○ step child's school connections creating opportunities for you ○ desire to get degree inspired by children being in school ○ having children prompting desire for education ● VALUE OF OWN EDUCATION <ul style="list-style-type: none"> ○ Anxiety over mother identity as high school dropout ○ smart kids and family, feeling "diminished" from being uneducated, impact on self-perception ○ Felt like raising successful children was her duty bc she considered herself a "high school dropout, screw up person" ○ Education as a means for social advancement ○ Had an unmet desire for education, felt diminished for being uneducated ○ using education to jump social classes (mobility) ○ associating uneducated with impoverished, limits opportunities for self and family ○ Comes from a family of educated professionals, nurses and a chemical engineer --> she is a teacher, suggesting that she feels the discipline is looked down on ○ every family member has degrees (associated with esteem), contrast with the teacher (pink collar?) ○ desire to be educated to provide to children (financially or to share values, etc.) <p>THOUGHTS ON GENERAL EDUCATION</p> <ul style="list-style-type: none"> ● Raising children gave a different perspective on innate ability in people --> not as Jeffersonian ● Different abilities --> different kinds of intelligence --> different needs and styles ● Memorization was important in participant's education but not for daughter who is smart but doesn't have a memory like a dad or brother ● good memory (them and one child, one child without), this emphasized the value of having a good memory ● value of having a good memory being overshadowed by accessibility of info ● individual aptitude towards specific subjects <p>CHILDREN/SPOUSES' EDUCATION</p> <ul style="list-style-type: none"> ● Children went straight through to college rather than taking a gap
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	<ul style="list-style-type: none"> • one child followed their path in following interests • Comes from family of educated professionals, nurses and a chemical engineer --> she is a teacher, suggesting that she feels the discipline is looked down on • every family member has degrees (associated with esteem), contrast with teacher (pink collar?) • well educated spouse and child • Wife is "computer expert" and good at fixing things • Other daughters have changed degrees, careers • all children (and step), go to college, change major, discover interest • Sees transformative influence of undergrad on children • Dyslexia runs in family --> colors education experience • Dad encourages them not to stress about choosing a major bc they'll probably change their mind • Daughters graduate, but son is more like P230 --> doesn't like lack of structural freedom in degree, drops out of (graduate?) program • "It's still the same story." --> daughters in college indecisive about what they wanted to do, except middle daughter who wanted to be a doctor and stuck with it • Spouse and daughter went "traditional route" --> husband has masters and daughter was valedictorian and studied abroad <p>OTHER</p> <ul style="list-style-type: none"> • it helps to take a gap year • spending time with kids in college (lunch) • money limiting education • following interests in college vs degree plans • doing difficult puzzles with grandson, lifewide? • sense of accomplishment as motivator • stumble along and find your way
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Table 11

In the simplest way, the analysis and coding involved:

1. reading transcripts
2. code with questions
3. summarize topics

4. create schema
5. code with schema

within this process, schema and analysis evolved through an iterative process.

In summary, chapter four describes how I navigate the analysis through the data coding cycles and reflection loops through those iterations. I demonstrated the emerging process for navigating clusters of codes into developing themes. The iteration of the cluster and coding process aligned with my research design as discussed in chapter three, exploring the lived experiences of older adults I interviewed. The provided summaries derived from the narratives of the participants.

As discussed in chapter four, I refined the emerging themes through open coding in a second, third and fourth cycles of coding effort. Through this analysis the final developing codes emerged as *sociability, reasons [desire] for learning, barriers or affordances and environmental factors* (Table 12)

Table 12
Demonstration of themes

Sociability interaction inclusion	Theme one
Personal desire for learning for the sake of learning self-gratification, efficacy betterment enjoyment	Theme two
Barriers or affordances towards education barriers affordances	Theme three
Environmental factors room and building features physical ability	Theme four

Table 12

Chapter 5

FINDINGS

Findings

The purpose of the study was to explore the educational interests and preferences through the experiences of older Baby Boomers age 55-84 to begin to understand, through their expressed aspirations, motivations and defined educational goals, what influences the older adult in education participation and guides the preferences they may nominate toward learning environments. The

research examined the older adult concerns as a life-long learner while participating in the Osher Life Long Learning Institute. Studying the underpinnings how older adults experience education and what interests and preferences they have toward learning in older life, revealed the importance older adults place on the social aspects of education, the joy learning can generate, and the affordances toward positive aging rooted in their educational experiences. I used a qualitative framework to design my study. Methodology common to narrative research guided my approach in how I collected and analyzed the data.

The study focused on the following research questions:

1. What do older adult report as their educational interests, aspirations, motivations, and goals and what do they identify as barriers they face in realizing them during their older years?
2. To what extent do educational interests and motivations originating in the older adult's educational aspirations, influence their preferences for learning environment qualities?

The underpinnings of my study questions were to explore education interests, aspirations, motivations, and education goals and the preferences for the learning environments of older adults. The interviews allowed to harvest a broad narrative of education experiences illuminating the older adult's interests and preferences. The forming codes *sociability, reasons [desire] for learning, barriers and affordances and environmental factors* followed the understanding of educational aspirations, motivations, and goals. This chapter will report on the results of the codes that emerged in the analysis.

Code frequencies by participants. The code frequencies guided me through themes to understand which are more prevalent than others. Not all themes proved to be relevant when I went back into the transcripts, field notes and analysis and some lacked the desired richness. This process of analysis, however, was an essential step toward framing the findings. The process identified 768 statements significant to the study. As I reviewed the initial groupings of meanings shown in my analysis chapter, relating the responses more and more to my research questions, I was able to organize all statements into seven coded

clusters adding the frequency of individual codes by the participant to the cluster.

The clustered response with participant frequency is presented in Table 13.

Table 13
Code frequency by participant

code frequency table	210	310	220	320	230	330	240	250	260	270	280	290	Total
Sociability	1	1	5	1	2	2	2	1	5	4	1	4	29
Social inclusion	7	0	1	0	4	0	0	0	3	1	0	0	16
Opportunities to interact	0	1	1	0	2	2	1	1	2	7	1	2	20
Motivation to engage in learning	0	2	0	0	0	0	0	0	0	0	0	0	2
Positive aging	3	4	0	1	3	0	1	1	1	0	1	0	15
For pleasure, self-gratification, betterment	7	4	4	9	8	9	6	6	8	17	11	6	95
To meet social expectations	3	2	6	1	1	0	2	0	4	3	5	1	28
Degree-seeking	4	3	4	3	1	0	4	1	4	3	4	0	31
Structural freedom	0	2	1	0	2	4	1	3	0	1	1	1	16
To improve career	6	3	3	5	1	1	2	1	4	3	1	1	31
Get \$\$\$	2	0	0	1	3	0	0	2	0	0	0	0	8
Environmental preferences and affordances													
Environmental impact beyond the physical space	3	2	5	2	3	2	3	2	2	1	2	1	28
Thoughts on previous experiences and environments	4	0	1	0	1	2	3	5	6	1	1	0	24
Physical limitations and needed accommodations	0	0	5	0	1	0	0	1	0	3	5	2	17
Preferred environmental features/conditions	3	4	7	2	1	3	3	3	3	8	4	6	47
Time or duration of class	1	0	0	0	1	1	0	1	0	0	0	1	5

Use of technology	0	0	7	3	0	0	0	1	0	0	1	0	12
Barriers towards seeking educational experiences	1	0	0	0	0	0	0	0	0	0	0	0	1
Personal	5	3	6	0	8	7	3	3	0	3	3	7	48
Historical	2	0	3	1	0	0	0	1	1	4	1	4	17
Institutional	1	1	3	1	2	3	1	1	0	1	0	1	15
Interests in subject matter of education	5	8	13	11	2	5	2	9	6	9	4	9	83
Life milestones	1	0	0	0	2	0	0	2	1	0	0	1	7
Redirecting education to lifewide learning	3	1	5	7	10	5	1	6	2	4	2	5	51
Need to redefine goals or social status	3	3	5	1	8	1	0	3	1	1	3	1	30
Inhibiting educational opportunities	0	3	2	1	1	1	0	1	2	1	0	2	14
Other things to explore													
Love of reading	2	2	3	2	0	1	1	1	4	2	2	5	25
Perspectives on children's educational experiences	3	3	1	0	4	4	0	2	4	0	1	1	23
Self-efficacy in previous educational experiences	0	2	1	1	0	1	4	0	0	0	0	0	9

Table 13

Education Interest.

Education interest in younger years.

Nancy: OK. Let me see if I can say this. **When I saw what I was really interested in, the finance, the delivery of healthcare to create an efficient, effective healthcare system that's there, cost-effective, health as a better quality of life.**

Education Interest in their older years

Course subject matter

James: Yeah. The OLLI [Osher Lifelong Learning] classes, I never ceased to be amazed by them. When for the classes, the catalog came out, my first classes were both mostly centered on **history, political science, things like that**. Eventually, I wandered off, and I don't know even why I did it. I was vaguely familiar with the problems in the Middle East and a little bit interested. **They were so well taught, just incredibly well taught. It has created more of an interest.** Now, if there's a class on the Middle East that I can possibly take, **I do that because it's fascinating and just really interesting.**

John: The only stuff I've focused on, political stuff and I've taken one philosophy course that I enjoyed quite a bit, because it was an overview of six big issues. It was good to get in a group where there was a cross-section [laughs] of diverse feelings on those issues and listen to people. I expect most of what I will continue will be political and history stuff. **I try to stay current on areas and issues that I'm interested in. The content has to interest me.**

Linda: There are **certain topics, certain courses, that I gravitate to**, but I will take almost anything. **Weather is a big interest; politics has become a big interest.** I'm just a generalist. I am, in a lot of my taste, what I watch on television and what I read. No real desire to specialize in anything **but the subject matter has to interest me.**

Jennifer: To stay with OLLI [Osher Lifelong Learning Institute] classes as long as I can and to continue reading. I'm an avid reader. Have my areas that I enjoy more. **I'm particularly fond of interior design** magazines, which is why I liked your program that day when you talked at the *Mornings with the Professor*

[laughs] because that's just right up my alley. However, I got much time, **my interests and materials are invested in the art.**

Betty: My thing, **I love history. Love, love history.** If there is anything history, **I want to learn about it.** Not because I want to be a Historian, I just find it fascinating. They're like one big biography. To me they're fun. They're cool.

John: I wish I could finish my MBA. Doing a little more in politics. **I try to stay current on areas and issues that I'm interested in.**

Linda: There are areas of learning that I'm definitely not interested in. **I gravitate towards things that I am interested in.** I want to be able to question and get answers. It has to be some curiosity.

Aspirations. Aspiration is the container for several of the main themes resulting from the analysis. **Sociability** and social interactions, **desire for**

learning and **affordances** in some variation align with aspirations and are embedded (Table 7). I argue aspirations are the path to conscious and active goals which we hope to achieve or something to grow into. We hope to get to this future desired stage in some subjective manner. Looking back through the timeline of the participant's narratives, most of the older adults illuminated a circumstantial education aspiration. Their very personal life opportunities likely drove the aspirations and as such are also motivators to achieve their educational goals. It became apparent through the interviews that participants did not see their education aspirations as only isolated in their older years. All participants wanted to report on their educational aspirations in younger years, though none of the older adults made necessary connections between their aspirations as adolescent or young adult and educational aspirations they have as an older adult — some of the themes overlapped by the narratives of several older adults — for example, role models within peer groups, friends or teachers which participants wanted to aspire to. Or societal circumstances or inequities, perceived 'unfairness' which inspired participants to become a change agent. James entered the Army and

happened to end up with a group of peers who appeared to him more mature, more educated, and he aspired to rise to the same level.

Aspirations in younger years. Some of the themes overlapped by the narratives of several older adults. For example, role models within peer groups, friends or teachers which participants wanted to aspire to. Or societal circumstances or inequities, perceived 'unfairness' which aspired participants to become a change agent. James entered the Army and happened to end up with a group of peers who appeared to him more mature, more educated, and he aspired to rise to the same level. James and William relate their aspirations to grow and to mature. They do not exclude to receive a degree to build a career, but that is not their primary educational aspiration. Education happened because *others inspired them, or this is what you do, you go to college.*

James: It's like the Army and those people that inspired me to go to college. I didn't necessarily need it for a job at that time.... **I saw what a difference education made in your life.** I wanted to get a degree in

something so that **I would be more worldly and better educated**. It was not at all,.... I do not think employment related.

William: I went to college because that's **what I was always going to do**, go to college. I had no idea what I was going to do. **But I was happy in college**. I just went. It wasn't until I started graduate school that I finally decided what I thought I wanted to do was to teach. I thought that would be a wonderful life, a life of academia and learning would be of great interest.

James: Even from the time I was in the Army where almost all the guys I was stationed with had college degrees, **I wanted to be more worldly**. They seemed way better educated than me, way more worldly, way more interesting. **That is really where I got my desire for continuing education** as being in the military

...It taught me the value of a college education. That was really my inspiration for undergraduate school.

Nancy aspired to become a doctor and, for many reasons eventually entered nursing education. She was uneasy with discovering the fraud, waste and political forces in the healthcare industry and aspired to medical education to make change as a doctor.

Nancy: I saw the waste and the fraud and the abuse and the overuse and saw the male distribution within our current healthcare system, **made me very much interested in reform..... I think it changed my educational aspirations**, but it also enlightens me to the difficulty within our system...

Several themes overlapped in the narratives. Changing one's view of the world, the thirst for new knowledge, curiosity aspired for many primarily in the older adult's college years. Nancy, for example, experienced an uneasiness of the education she received going to church as a child and aspired to other points of views when she entered college.

Nancy:**getting to hear other things in college, maybe planted a seed,** I hope it did that. I think the education that I received to going to church all the time as a kid in a conservative church, and feeling like, "This can't be right." [laughs] "There's got to be a different way than this. Listening to them." To make peace with my intuitive stance and undo that background stuff, unlearn that part of my childhood education.

Aspiring to education for some was driven by career aspirations, by the need of supporting a family or dreams to make money supporting their independence.

Mary: When I was younger I had this, "Well, I've got to be rich." **I wanted to be independent and be where I didn't have to worry about money.** Anyway, I was really driven by making money in the first part of my life. Now, I'm more in touch with trying to make myself happy. I was always trying to make myself happy, but more so now, it's not so much about money.

Jennifer: it seemed like, if **I want a family** and [support them] I want to do that **I need to get an education, make money**. I liked that idea. You know being an at-home mom was not an anomaly at that time, but I wanted to do better.

Aspirations in older years

Many participants aspired to broaden their experience or to educate them about *things*. They aspired to their own curiosity, or betterment Participants aspire to get more knowledgeable about the world. Many wanted to understand world events which happened during their college years and which they never wholly comprehended in their younger years.

Mary: ...if nothing else, **to learn new things** and things that are broadening my experience.

Linda: I want to know things. That's the only real aspiration that I recall, that would've put me back into a college situation, but **I still always liked to learn.** I would go to lectures and things like that. Then that aspiration, in terms of landscape design, just was a bit of a coincidence... The whole thing with landscape design was almost an accident, and once I got in it, I was just consumed. [laughs] It became an aspiration. As far as education aspirations are concerned, it's just **to keep learning about as many things as I can.** But I don't have degree aspirations. I have never aspired to education what points me toward a career.....They were all just self-knowledge aspirations.

James:Well, as I said, **education is extremely important to make you more knowledgeable.** I graduated from High School during the Vietnam War. **I am taking classes now to understand what happened back then.**

William: ... I kept doing what I found interesting and **pursuing my own curiosity**. That's when I started thinking about retirement, and that stage of my life about continuing to learn. I was very happy that OU [University of Oklahoma] had such a program [The Osher Lifelong Learning Institute].

Motivations. Motivation is the container for several of the main themes resulting from the analysis. **Sociability** and better social life, **desire for learning**, curiosity, and **affordances** in a career or mental health in some variation align with motivation and are embedded (Table 8). The narratives showed many incentives and reasons why participants engaged and participated in education. The motives for the older years of the participants were generally different from the formative years of their college years. Educational motivation post-college or in the participants older years include self-care, happiness, wellness, and sociability. Vitality and brain health or the fear of dementing was often mentioned as a motivator to engage in continuing education in later life. Participants thrive on learning and are motivated to learn more, to be more knowledgeable. For many

the sheer joy of learning or meeting people to socialize motivated to participate in education in their older years. The motivations in college years may be more aligned with preparing to support a family or prepare to build a career. However, even during college, the motivation to learn was driven by the joy of learning. Motivations to engage in education had different reasons post-college compared to the formative years of college. Many mentioned the expectation of their environment and the pressure of parents as one motivation to go to college or to finish High School. The opposite is true too as part of the rebellion character of teenage years or motivated by the discouragement to go on with education by the environment in which participants grew up or the discouragement of their parents. Often a career choice or to have a career was the motivator to participate in education.

Motivation in younger years

Linda: I needed to find a career because I had not had one. I needed college. I wasn't really qualified to do anything. I was trying to find since I

had a four-year-old child, something I could do that would be interesting and that I could move up the ladder.

Michael: I started as a 31-year-old father of one and another child on the way. I wanted to learn the law. Really, **I was there to learn** not to make grades or not for somebody else. I was paying for it, and it was costing me a fortune that I didn't have.

William: Education, honestly not until I was in my mid-30s was the change when I realized **I needed something that could provide a decent living for my family.** When it reached the point where I had dependents, and I knew I needed to do more to **provide for my family.** That was the motivation that sent me to law school.

James: It sounds a little bit like, back then when you were college age and when you started to become a young professional, **your motivation was an education because of your job.**

Joseph: When I was working for my bachelor's, **it was like something everybody did, everybody in my family.** My mother was a real impetus for me.

Robert: **My motivation, it was driven by my parents.**

Michael: I was driven by grade just **because the expectations of my parents.** We're four boys in our family. We were all a year apart, and we were just expected to do very well. The expectations were high.

Mary: I didn't pursue a degree because I didn't agree with the classes that they thought I should take. **I took classes that I enjoyed.** I didn't try to get a degree.

Linda: .. education and learning has always been extraordinarily important to me, but in my mind, is not tied to earning degrees or

specializing. I don't know what else to say. **It's not degree-related; it's just knowledge-related.** It's something internal, and it's just something internal. I just love to learn. **I love to learn new things. It's fun too.** Back in college and now too.

William: I wasn't smart [laughs] about what I did, but I enjoyed the heck out of it. I can't look back and say that there were times that it was unhappy, unpleasant, any of it. **I loved learning new things and going along, enjoyed that.** Still, do. That was my educational [laughs] history.

Motivations in older years

Robert: .. the OLLI (Osher Lifelong Learning Institute] courses that I've gone to, **the motivation is just learning new stuff.** [laughs].

Jennifer: I knew when you had to get help, and you didn't....which got me involved in things related to my nursing education. Get my brain fresh.

Also, **that knowledge helped me keep my kids healthy and not have to run to the doctor every time something went wrong.**

William: I find that to be really fulfilling, and I do think it's very important. The older we get, **the more important it even becomes to keep your mind active**, keep learning new things, making the mind work, **think about new things**, because there's always more to learn about and enjoy.

Nancy:one of the drivers for me with OLI is to **use my brain**. I think for me that's the best connection to vitality. Just **keeping the brain active**, learning new things, and being curious about new things. Curiosity [motivates me]

James: In addition, you get older, a short-term memory is going to hell. Your mind is like a muscle. If you don't use it and exercise it, it shrinks or is not developed as it could be. My friend, I mentioned earlier, that was

the DA, he got some form of Alzheimer's. I saw him deteriorate; his mind went away. That's a great fear of mine that you would be physically fine but not literally here. That's a great worry of mine. **I try to keep mentally active**, reading books, taking OLLI classes.....**now motivation sounds more like you wanted to train your brain and to stay brain fit.**

Joseph: I would grab convenient education if it's there. I don't intend to stop learning. **I get more pleasure out of learning than just about anything.**

Robert: Now that I am working **I just thrive on learning.** Yes. Shoot, I've often toyed with going back and getting my Ph.D. just simply because of the challenge [laughs].

Betty: In the younger years it was just to get as far away from academia as possible. I mean, I truly, truly hate the school. I was at odds with teachers. I was at odds with the principal. None of it worked for me. **As an adult**

now, I like to learn new things. I like to be aware of changes.

Differences. **The new layers of things that are uncovered. It's fun. All**

the classes, I just did enjoy the heck out of those. They're just.

Obviously, there's no pressure at all. It's purely just the desire to learn.

Yeah, just looking to have fun, yeah. Learn something new, see something different.

Jennifer: I am a widow. I need to stay in contact with people for my own enrichment and pleasure, going to lunch and making friends. The learning.

I just think learning is fun. It opens new awareness and enriches your understanding of the world and the people in it. I do like being around people. I just very much enjoy people.

Linda: I think curiosity has a lot to do with it. I like to be able to talk to a lot of different people about a lot of different things. I've just always been interested in...maybe it's just I like people. I like talking to people about

different things, and to be able to do that, **I have to educate myself. Yeah, curiosity.**

James: My thirst for knowledge has gotten greater and greater the older I've gotten.

William: It's still the same, which I'm delighted that I have, at that almost 70 years of age. **I still have an unending curiosity. I just love to go learn** and hear something new. Just an opportunity to stay engaged, to learn. Again, for me, it's just the sheer enjoyment of learning. Like I say, I find great pleasure in learning new things. That is my reward. That's what always motivates me.

Susan: I'm not looking for employment or anything. **I'm doing it for me.** Very selfishly for me. I don't have to worry about anybody else. I'd like to meet new people, talk to new people and see new things.

Educational goals. As participants recognized their aspirations and formulated the motivations in the narratives and why they participated in education in their younger years, they did rarely express aims and ambitions and how those establish educational goals in their later years or retirement.

Educational goals in their younger years

Nancy: OK. Let me see if I can say this. When I saw what I was really interested in, the finance, **the delivery of healthcare to create an efficient, effective healthcare system that's there, cost-effective, health as a better quality of life.** I saw that. I saw where we needed to go, but I thought I don't have the energy or the time to go further in terms of education. But I can see it. Mmhmm. **I consider that as an educational goal.**

James: I did know that my friend was the district attorney **and I wanted to be an attorney so I could do that kind of work. To become a lawyer was my goal.** That's why I went to law school. You had to go to law

school to be an attorney or to be an assistant district attorney, so law

school was employment oriented totally.

Michael: I really did want to go to law school. I didn't know exactly what

I was going to do as a lawyer, but I aspired to be a lawyer. That was

my goal.

Jennifer: Went on to the University of Michigan with no problem. I was a

science major. I had long wanted to be a nurse. You could either get a RN

or you could add two more years of academia and get **a degree in**

nursing. A bachelor's in science. I wanted that. That was my goal.

Educational goals in their older years

Nancy: Another of my educational goals now is to stay mentally fit. I

consider that as an educational goal. Besides the fact that it is done and so

shall all of that, one of the drivers for me with OLI is to use my brain. I

think for me that's the best connection to vitality. Just keeping the brain active, learning new things, and being curious about new things.

Joseph: Current goals?. It's probably just keep on doing what I'm doing.

Stay healthy, mentally fit. Keep on doing it. **I'd like to read half of the books on my shelves back there.** I don't think I'm going to live long enough to read.

Susan: At that time, a woman could be a secretary, a nurse or a teacher. **I was going to be a teacher. That was my goal.**

Jennifer: **Sociability is a goal. I'm 83. I am a widow.** I need to stay in contact with people for my own enrichment and pleasure, going to lunch and making friends.

Sociability. Sociability plays a vital role in the positive aging of older adults and in protecting from the experiences of psychological stress. Sociability

is enhancing well-being (Sugar 2014) reduces feelings of loneliness and allows older adults to age positively even with experiencing a physical decline.

Participating in education allows growing social circles. For many of the study participants, it did just that. Study participants reported positive social experiences from participating in education in their older years. Prior educational experiences include social encouragement toward education by their role models. Now they seek opportunities for social interaction in the classroom setting through discussion. Participating in a classroom enables them to enrich their social life, start new relationships and meet new people.

Sociability as an older adult learner becomes much more conscious to the participants in older age. It is almost as it becomes part of their concept of lifelong learning, certainly a motivator to participate. As the literature in positive aging has pointed out, loneliness and a lack of social interaction becomes a fear in retirement and poses significant stress to the older adult showing adverse effects on the older adult health and well-being. Many participants acknowledge the value of intellectual creativity through lifelong learning and the resulting benefits which include increased socialization. Carney et al. (2014) and other researcher

defined the elder orphan as baby boomers who do not have adult children, spouses, relatives or other support groups. However, even when older adults have extended family around them, they can experience psychological distress by loneliness.

John: I wouldn't want an environment, for me and at OLLI [Osher Lifelong Learning Institute] class that tended to isolate me from the other students. **For me, that's one of the things I enjoy is not only the instructor and the interaction between the instructor and the participants but also interaction as a participant with other participants.**

Mary: Coming on campus makes me feel young again. **Meet people. It gets me out of the house.**

Robert: Until you're not working, and you don't have that social interaction, you don't know that you miss it, [laughs] but I did. Last year

or earlier this year, I took one summer course, I took two in the spring, like four classes. I think I got two of those. **I just literally got bored. I really missed using my mind and the social interaction.**

Jennifer: However, at age 83, I realized that that may be winding down. I've been doing it since OLLI [Osher Lifelong Learning Institute] started. It's just been a wonderful experience. Just everything about it has been wonderful. It opens new awareness's and enriches your understanding of the world and the people in it. **I do like being around people. I just very much enjoy people.**

Susan: I like the classroom upstairs [at the Osher Lifelong Learning Institute], where Cal has the classes. Where it's open, and everyone can speak. I think the thing that's wrong with seniors today is we're separated. **Any time you can get a bunch of people together, and they can carry on conversations, it makes their life better.**

Betty: Going to the place at OU [University of Oklahoma] with my mom and dad, you meet people; you get exposed to things. Lifelong learning provides me opportunities to step out of my comfort zone a little bit, **meet new people, and just have a richer life experience. Less isolated.** And through that, I met nice people and got to know them. I take courses to meet people. Otherwise, I could just sit in my house and be a troll. Bake brownies all day, and that's about it. [laughs]

Social inclusion. Belonging is not a human need assigned to old age only.

In a traditional sense old age is the time of holding stories and the histories of communities, keepers of knowledge. Belonging is essential for positive aging. The growing number of baby boomers retiring and who are now away from a traditional workplace will socialize elsewhere. These older adults still want to define their social space, though not admitting that they are old. Perhaps *Elderhood* conceptualizes the final “hood” of an adult following childhood, adulthood, and parenthood (Richmond 2012). Lifelong Learning Institutes and learning in older age might just be what post-industrial societies can provide as a

place to craft new opportunities to belong, generating ways to belong when traditional roles and responsibilities vanish.

Mary: I like the kind of classes that took homemade classes and different classes that we interacted more than just sit at the desk and had to take notes, that kind of class. ... **just enjoying being around people.**

Michael: We think the OLLI [Osher Lifelong Learning] course is really fun because they're small enough groups where there're a lot of people like I am who had different life experiences but are just there for the enjoyment of learning. **You enjoy the discussions and hearing what other people think about different events that's happened. It's a good opportunity to interact.** In OLLI [Osher Lifelong Learning Institute], most people are about my age.

Linda: **Like a round table where everyone can see each other.** I like that face-to-face interaction, rather than being lined up and just looking at a screen or professor or whatever. I think for older people that's probably

even more preferable so that you can see one another. When you can see someone's face when they're talking because there's a lot of exchange, people telling their experiences and asking questions. **You feel included.** I like to be able to see their faces and quite often in a class where we're just in rows. I can't see who's talking and that makes sense socialization and education, too. **You want to belong to that group.**

Betty: It also [participating in classes], by doing so like with Mom, **provides interaction with other people**, to hear their perspectives, to see what they've done, how it's worked for them. Like learning from family.

Susan: I like the classroom upstairs, where Cal has the classes. Where it's open, and everyone can speak. You can see each other and interact. The class I like best that I took is...David Ray taught a class with half seniors and half students... an intergenerational class. I enjoyed it much.

Including us with the young people. Our students really seemed to like it though, too.

Nancy: I had taken some of his classes [at the Lifelong Learning Institute] that were multigenerational, with the current honor students [at OU]. We were sort of...honor student, OLLI [Osher Lifelong Learning Institute], honor student, around the table. **We started off the class by giving our generational experience or positioning ourselves and time.** In terms of greatest generation on that to the millennials. I was born just as the war started. I'm not a baby boomer, but I'm not the greatest generation. I was a war baby. What was nice about that is we got to make eye contact. **To see people speak, see their expressions, see their body language when they were speaking. It adds a richness** to it that if you're in a large class and you're just seeing the back of someone's head when they're speaking, it is not as full an experience as being able to see someone's facial expression. Make eye contact with them. I like that. I understand that's not always possible.

Reasons [desire] for learning. For many study participants *learning for the sake of learning* stood in the foreground. Others feared diminished brain capacities if they did not stay mentally engaged through learning. Staying mentally active and keeping mental abilities up was one reason why they participated in the Osher Lifelong Learning Institute. Brain science shows any brain can create new connections between neurons if given the opportunity.

Vitality and brain health. James for example fears that his mind could deteriorate without “brain exercise” and participating in intellectual creativity might help to escape dementia. Science does not show evidence that “brain exercise” can or will delay or cure Alzheimer, but there is striking evidence that physical exercise, a balanced diet, engaging socially and participating in mental exercises can improve memory loss 30 – 50% (Henderson 2014)

James: Well, as I said, education is extremely important to make you more knowledgeable. In addition, you get older, and a short-term memory is going to hell. **Your mind is like a muscle. If you don't use it and exercise it, it shrinks or is not developed as it could be.** My friend, I

mentioned earlier, that was the DA, he got some form of Alzheimer's. I saw him deteriorate, and his mind went away. That's a great fear of mine that you would be physically fine but not literally here. That's a great worry of mine. **I try to keep mentally active**, reading books, taking OLLI classes. Yes. It's like I said, I need to keep my mind at things, that's part of it.

William: I'd wondered about in retirement, **what would I do to keep my mind active to do things?** When I was still working, I began to receive the pamphlets from OLLI [Osher Lifelong Learning Institute]. That's when I started thinking about retirement, and that stage of my life about continuing to learn. That was something that made me think about it. I found that very attractive, the idea of doing that. I was very happy that OU [University of Oklahoma] had such a program.

Nancy: one of the drivers for me with OLLI [Osher Lifelong Learning Institute] is **to use my brain**. I think for me that's the best connection to

vitality. **Just keeping the brain active**, learning new things, and being curious about new things.

Self-gratification. Many older adults participate in lifelong learning guided by educational motivation, their willingness accepting challenging tasks they want to overcome and the value they place on self-direction following the strong curiosity they feel. They seek self-betterment and to explore their educational interests in learning new things and engaging in learning for the fun of it. Many stated that they want to become more knowledgeable and broaden their understanding of the world, always keep learning. Others simply want to "get out of the house," want something to do and keep busy.

James: My education is getting ad hoc. It's like the Army and those people that inspired me to go to college. **I didn't necessarily need it for a job at that time. I just wanted to be more worldly.** I saw what a difference education made in your life.

John: I try to stay current on areas and issues that I'm interested in.

There are some areas that I know can be very interesting to other people, but if I'm not, I'm not going to go to a class just so I can say, "I've got a little bit on that." **I'm more oriented towards learning the same things but more in-depth** than I am learning completely new areas

Mary: Now [at the Lifelong Learning Institute] For me, it's not so much that I have a degree. **It's the learning experience, learning new things,** and just enjoying being around people. Some people have to have the piece of paper on the wall. I'm not that type of person. **It's more internally for me.** I know that I've done it and I don't have to have the recognition, I guess. That's where I am today. For the last three semesters, I've been taking courses that I've enjoyed, just to get it. If nothing else, to learn new things and **things that are broadening my experience.**

Robert: At this point in my life, I could probably go to any OLLI [Osher Lifelong Learning Institute] class. I don't care what the subject was, and I would enjoy it.

Even now, I'm probably taking a history class and then probably just love it to death. **It's because now it's just broadening my view of everything. Anything to gain knowledge is [laughs] awesome** at this point in my life, and to hear about any subject.

Jennifer: The learning. I just think learning is fun. It's betterment. **It opens new awareness's and enriches your understanding of the world and the people in it.**

Michael: I would say that's my real aspiration. It's not so much more knowledge. **It's fun to experience as you are learning it.** I feel like I came to it because of the family connection there.

Linda: There are areas of learning that I'm definitely not interested in. **I gravitate towards things that I am interested in. It's very selfish in a way.** Learning certain things give me a great deal of pleasure. Other topics

bore me, and **it's self-gratification**. [laughs] I want to be able to question and get answers. It has to be some curiosity.

Nancy: My experiences in school, I love learning. **Learning new things, and being curious about new things.** I love to figure out how things work in a little secret world. How they...Yeah.

Joseph: I'm going to continue to take OLLI [Osher Lifelong Learning Institute] courses. I would grab convenient education if it's there. I don't intend to stop learning. **I get more pleasure out of learning than just about anything.**

Betty: I just never had any success until it was strictly for fun. Which is what it's been when I did adult things. Not for a grade, not for their approval. Just because **I wanted to know more**. That's how I've always done my life. **If I think it's interesting or might be fun, or I want to know**, I ask a bazillion questions. Yeah, just looking to have fun,

yeah. Learn something new, see something different. Just to learn something new that I haven't learned already. But, not for an academic raid. I think that's where I struggled in regular public school.

Barriers or affordances

Barriers. It seems most education memories perceived as barrier relate to grade school or college. Many of the study participants, particularly those who reported growing up in the southern part of the United States, went to one room schools or experienced segregated school systems. Shaming as a pedagogy was prevalent. Those who were first-generation college students mentioned their struggle trying to figure out how to get into college or how to be able to afford higher education. At the same time, they expressed curiosity and a strong desire to learn in other sections of their narrative. Sometimes a participants own attitude got into their way and became a barrier in their education journey and incompetent teachers, usually on an interpersonal level or not trained for special education situations, were often perceived as a reason to leave a class or school. Dyslexia caused shame among some participants and though it was perceived as a barrier, however, did not cause the avoidance of general education experiences.

Unfortunately, sexual abuse also played a role in the education milestones, and so was bullying. One would expect that having children or raising a family will create a strong barrier in one's educational journey — several reported on the hardship going to school posed on them while raising a child or trying to provide for a family. As it is with today's generation, personal health can quickly change the course of one's education plans. Changing curriculum and policies are still today a barrier for many students who had faced health problems forcing them to pause their education for several semesters or perhaps years. In their later years, learning environments not supporting good sightlines to the screen, creating acoustical problems, or hindering to navigate the space were perceived as barriers.

Perceived barriers in younger years

James: I graduated from Purcell High School in 1965, and that was during the Vietnam War. It never really occurred to me to go to college, because I didn't think my family had the money to send me to college, and I didn't know there were student loans and things. Because no member of my family had gone to college, I was not aware those, how to apply for

student loans and things. My family was sharecroppers back in those days.

We moved around quite a bit, from central Oklahoma to a place called Elkhart, Kansas and Erick, Oklahoma. I was released from the Army a month early to join school. I immediately enrolled in college. My student loans obviously had gone away. I applied for some new ones. **Money was still a problem. I would go to college a semester and work a semester to make money to go to the next semester. I would go a semester, lay out a semester, go a semester, lay out a semester.** I did that for probably a year. After that, I was able to stay in college all year long and work on the hours that I was not in school. I still worked 40 hours a week, but I also went to school full-time. It did take me a while.

Mary: One of the things that **soured me a little bit was when I had the teacher that sexually abused me.** It never went to the point that it was actually sexual, but I was 15, and he was 30 something. [laughs] It was inappropriate. He was married. That did alter my...I don't know [frowns]. I don't really guess it did me much [physical] harm, and it was more of a...**It did take me several years to**

work through that, but I did. I was able to work through it. That was a little bit of a down time in my educational experience. I could not move on in my education.

Robert: I had a **real problem with reading**, and there was a lot of anxiety degree. I felt so nervous and anxious that I don't remember that I really read anything, but I do remember feeling very, very anxious. **I still struggled with reading** all the way through high school. My anxiety with reading followed me all the way into college. I felt abnormal.

Betty: I have dyslexia. My only memory from kindergarten through when I dropped out in high school because I did drop out, my senior year in high school, I had one good teacher. She was my sixth grade teacher. Of course, even now **my spelling is probably a sixth-grade level**. I spell terrible. **Didn't like high school. Didn't like the environment. Several teachers irritated me**, and I would stand up and walk out of the class. I'd stand, or I'd walk home or whatever. Then my senior year I dropped out. It

wasn't until my adult life that I found academics to be anything acceptable.

I would have thrived better in a more medieval apprentice system of

learning. Train people for a skill. That's probably more my learning style.

In school, if you didn't fit the A, B, C then you were the F, and there

wasn't a lot of wiggle room. **There is a great need for diversity in**

teaching styles and just because it always worked then doesn't mean it

works now. You need to be openminded. That would be an interest to me

moving forward.

Linda: I needed to find a career because I had not had one... was trying to find,

since **I had a four-year-old child**, something I could do that would be interesting

and that I could move up the ladder. That would have required me to go back to

school. I could not do that. Even though I wanted to go to medical school, **I just**

didn't think it was fair to my child.

William: I hated the first year. If it wasn't for the fact that I had to finish, and **I**

borrowed money to go, and I needed to finish, I wouldn't have probably stayed.

I needed to take care of my family. I did, and ironically, ended up having a 30-year career in the law that I enjoyed, but it didn't start out well.

Susan: I took education courses. I had everything done except student teaching, and **I had a heart problem.** I was in the hospital for about a month during finals so **that I couldn't finish up.** When I did get well enough to go back to school, they said, "**No. You have to start all over again.**" They had changed the curriculum, and I said, "No way."

Nancy: I was then going to a school in town, and **I was bullied a lot.** That was miserable. Then I was a young high school dropout with three kids. When I was in the sixth grade, we had a teacher who, looking back, was mentally ill. She taught... nothing. We were kind of allowed to run amok. She controlled us by making us write lines or something.

There wasn't anything engaging, and there wasn't anything fun, there wasn't any participation class. We just had this woman who was some sort of culmination of very depressed, perhaps autistic. That was an

academic waste, and I was a bright kid. I thought that my dream would be to be a physician. I couldn't figure out how to go to medical school and pay for it and take care of my kids and blah, blah, blah [laughing].

Betty: In younger years, the fact that if you didn't academically do well, **they pulled your little chair right up by the teacher where everybody stared at you, and you were stuck up there away from your peer groups in your little hard chair. It's emotionally not good.** That was very common. I don't like segregating based on achievement. I think that's poor planning for classrooms.

Perceived barriers in their older years

John:...[at the Osher Lifelong Learning Institute] **I would almost not take a course if I knew it was going to be in that space, because of not knowing if I was going to be able to hear, and knowing for sure I wasn't going to be able to see.** I don't have very good eyes.

James: My problem with OLLI [Osher Lifelong Learning Institute] is **because I have to drive 15 or 20 miles, I don't like to take the classes five days a week.** I restrict myself, three times a week is about all I want to drive up there for any length of time. I restrict myself on the classes for that reason. I love two days a week. That's my goal, but sometimes I take more than this because I like the classes so much.

Affordances. The Army Draft was mentioned a few times by male participants. Going to college created a save heaven for one participant and afforded him not to be drafted for the Vietnam war. College provided the environment and the time to find a “calling” either for a career or a direction. One way or another, college years helped participants to find who they are, or explicitly helped them to associate with *identity*. For one participant, the high school system afforded to go back and complete the GED, equivalent to a high school diploma. This enabled her to cope with the feeling of shame before her first child was born, not considering herself a *drop out* anymore. Continuing

education in later life and engaging in life-long learning opportunities brought back nostalgic feelings about college years causing smirking faces and laughter. “Feeling young again” was one of the strong expressions caused by going physically back to a campus which was once a part of an earlier year’s education milestone. The Osher Lifelong Learning Institute, as the representation of life-long learning and education in later years, is perceived as an asset and gateway to many things older adult enjoy. Among them are an intellectual stimulus and learning new things in a test free, homework-free learning environment. Compared to the narratives about grade school and college years, stories involving the interactions with professors as experts participating in the Osher Lifelong Learning Institute, able to convey what they know, are generally positive and the engaging attitude of professors is praised. Many of the study participants made mention of coffee, water and/or snacks available in class is a most valued perk at the Osher Lifelong Learning Institute.

Perceived affordances in younger years

Joseph: When I graduated from Spring Hill in 1965, this was when the draft was breathing down everybody's neck. **I had to do something to keep out of the clutches of Uncle Sam. Best way to do that was to go to school.** I went to law school.

Jennifer: I was the only one in my family, up until that point, **that had ever gotten an education.** My family was just very much blue-collar. I thought it was a pretty good deal.

James: Undergraduate school is where **I really discovered who I was.** It **helped me to find my own identity** and things. That, too, added to my enjoyment of education. I love being retired but those college years maybe were my most enjoyable years until I retired.

Betty: I was pregnant five month, and I was freaked out my child is born a high school drop-out. All of a sudden it was so imperative. **I can get a GED.** I took the correspondence. You get the packet, and you do it. I had to go once a week

and take my tests in the counselor's office at the high school. **About four weeks before my daughter was born I got it all done, and my parents and my husband gave me a graduation party,** and I got presents, and I was 25 years old. I was now a high school graduate.

Perceived affordances in later years

Mary: getting back into my life to know that I have a life beyond what we had. It's given me things to do. It is a beautiful campus here. **Coming on campus makes me feel young again.**

Linda: To have a variety of courses I can choose from. **No homework, no test. You could just go and learn and choose from so many different topics.**

James: I think they taught it in an interesting way [at the Osher Lifelong Learning Institute]. **Extremely, extremely knowledgeable the professors were,** and again, I had so little knowledge, but they made it understandable. There was a professor

that taught a class on the Vietnam War. I'm sorry, I can't remember his name right now, **but he, too, was just excellent.**

If he taught basket weaving, I would take that class because he was able to express ideas and thoughts and synthesize those complex problems in a way that made them seem more understandable. It was both.

Robert: Professors are just these fascinating people in themselves. **They're so knowledgeable about what they're talking about. I just enjoyed listening to them** talk about anything.

James: I loved my undergraduate years in college and loved the setting. **I think the University of Oklahoma's campus is beautiful. Those are some of my most pleasant experiences in life.** Because those OLLI [Osher Lifelong Learning Institute] classes are held in college classrooms, and that was such a positive experience for me like I said, **those undergraduate years were some of the most enjoyable years in my life,** I never really thought of that, ... I sit in those hard seats and at those hard

desks. I would sit probably on a stump outside if they asked me to.

[laughs] **I just love the courses.**

John: I like **having coffee at the OLLI** [Osher Lifelong Learning Institute

[laughs] and every once in a while I'll have a glass of water.

Nancy: I do like the **coffee at the OLLI** [Osher Lifelong Learning

Institute] classes. When I first started going to OLLI, they had treats,

pastries, or fruits, or whatever. It was kind of like a little brunchy sort of

thing. That is not necessary, but I sure do like the coffee.

Environmental factors. For many “It's really important for old people to be comfortable and to be able to see and hear.” The study participants respond to the learning environment includes the building, rooms, and features in the rooms, and the limitations the study participants observe or experience while participating in classes at the Osher Lifelong Learning Institute. Materials, color or texture was only mentioned once. Artificial lighting, in general, was perceived

as good or not posing a problem. Windows are preferred, and if they are existing, older adults enjoy the views and mention it supports their learning. The beauty of the campus was mentioned a few times by study participants who had completed graduate or undergraduate studies at the University of Oklahoma. Stairs are mentioned as an obstacle getting to classrooms. Elevators are available, but the size of the elevator is so small that only a few people can take it and it takes a long time to get people up to the second floor. An interesting observation was made a few times about bathrooms and the location of stalls catering to the disabled. Temperature, either too cold or too warm was on almost everybody's mind. Either observing others struggling with room temperatures or being directly affected by them. Air from the HVAC system directed toward a person is always perceived a nuisance. It appears that the Osher Lifelong Learning Institute had moved in previous years and those participants who engaged with the Institute before the move seem to see an improvement in physical classroom conditions and the quality of seating. The participant's opinions about chairs, in general, were split. They were perceived as comfortable as well as uncomfortable. It was suggested that chairs need to be cushioned and higher with armrests so that older

persons can get out of chairs more easily. This property of chairs is often noted in the gerontology literature. Chairs, as a suggestion, also need to be wider and sturdier to accommodate the size of people in the study participants cohort. Many suggest that tables in front of chairs are needed for comfort and for note taking. Round tables, as a general classroom setting are preferred to see people's faces during classroom discussion, and such a setting increases eye contact, interaction, participation, and comfort. Navigating between rows, with or without tables for note taking was perceived as cumbersome, and the spacing usually was not comfortable enough to navigate between rows or chairs comfortably or without disturbing others. Many would prefer a circular or horseshoe setup for the rows to improve sightline to the presentation screen and the professor. Having a "head in front of you" was often a complaint. Some rooms were too narrow and too long with chairs far away from the projection screen, and this was also perceived an obstacle — crowded rooms with too many people in it were mentioned as reasons why a room was getting too hot, "too many bodies warming it up," or perceived uncomfortable because of the crowding. Large rooms seem to make seeing and hearing problematic. The acoustics in the classroom was in general

perceived poor. Difficulties hearing what was said upfront was mentioned often. Audiovisual equipment was always installed, it did not always work, sometimes the screen was perceived too small, or professors had difficulties to operate the equipment, and the resulting distraction was perceived disruptive or as annoying.

Perceived environmental factors in their older years

James: I've heard other people in the classes **complain about the temperature.** Generally, women want it to be warmer, and men want it to be cooler. [laughs] I am so happy to be there that I don't even think about that. **Nicer larger desks,** newer and more modern maybe, long desks, so you have a lot of space... There's something about the professor being down lower and a tiered classroom with seating going up. Like an amphitheater. If you're all seated at the same level, I like to sit in the back, so it is a little bit difficult to see the slides and screen if you're sitting in the back and you're on the same level as the people in front of you. The classroom environment in the graduate business school at the University of Texas was for me the most inspiring environment. The layout, how you

could participate, it was beautiful. **What I do find to be a problem is oftentimes, and I'm younger in the group, but I have issues with being able to see, being able to hear.** In the OLLI [Osher Lifelong Learning Institute] environment, I go early often so that I can sit close enough to be able to see and hear. **The room size is a big thing on that.** This is the upstairs room. I know they had to have that much space for the enrollees, but it was just, for me a bad space. **I would almost not take a course if I knew it was going to be in that space,** because of not knowing if I was going to be able to hear and knowing for sure I wasn't going to be able to see. I don't have very good eyes. **I need enough room to get in and out without rocking the tables that causes the coffee cups to spill.** The end ones, in the hallway, the corridor rooms, they're too small to have too many rows. Certainly, on those, most of the time when I see them set up, **I need to be in the front half to hear or see anything.**

Linda: Like a round table where everyone can see each other. I like that face-to-face interaction, rather than being lined up and just looking at

a screen or professor or whatever. **They've got comfortable chairs.** I can see where they might not be large enough for some of the participants.

The chairs may need to be wider and sturdier. If they need to do something where they turn the lights out they seem to turn it out all right and you're able to get the room dark enough when you need it dark, but the lights are good enough when the lights come back for me to see. **I don't like having anything blowing on me particularly if it's cold.**

Mary: I always wanted to have a lot of light. Maybe because I didn't ever see very well. **I needed the light to help me see.** [laughs] I didn't wear glasses when I was young.... I always wanted to have a lot of light. Maybe because I didn't ever see very well. [laughs] I like the kind of classes that I took homemaking classes and **different classes that we interacted more than just sit at the desk** and had to take notes, that kind of class. These classrooms in here [at the Osher Lifelong Learning Institute] seem so dark. Some of them don't have windows. **I know that I tend to want to look outside.** [laughs] I can look at nature and then listen and learn on a different level that way. It puts me in a different place because **I love to**

look at nature and get into a zone. Even if I'm uncomfortable, I can usually deal with it. I tell myself, "It's only a couple of hours" **if I like the class.**

Robert: It was always very comfortable as far as the physical space, I guess.

If I think about middle school, middle school was weird because back then it was a middle school that had no windows in. It was a big open school. The classes were, actually, if I remember right, they were just partitioned off. There were no walls, no physical walls. They were all just partitioned. It was just like one huge open classroom with three grades. It was weird. I think about high school, and those were all classrooms. When I think back at that time period, **I don't really think about anything negative or positive about my education from the environment.** Some of the **classrooms had windows, some of them didn't at OLLI** [Osher Lifelong Learning Institute] I guess there was one that we were **crammed into a space.** They opened a partition and then people were spread out long ways. That was, I don't know. **It was still fine.** It was comfortable and everything. Where I sat was fine, but it was...They did cramp us in there on that one, but it wasn't terrible. It was one session.

Jennifer: Then you get someone that **talks too fast, and wanders away from the speaker, and turns his back on the audience**, [laughs] and just points with their little pointer, doesn't make eye contact. All that doesn't work for me. **It's really frustrating when they don't know how to handle the physical equipment.** They don't know what to do with making their computer talk to the material that's in the room. You have to call somebody to come over to fix it [laughs] or show them how to make it work.

I like having direct eye contact from the speaker and having the speaker being able to handle the technology. OK, some things definitely come to mind. **I'm much happier working in comfortable chairs**, [laughs] but I like having a table in front me. When we first started, we were just sitting in the chairs lined up. Like [laughs] at the school library or whatever. At least I like to take notes. **I like a place to write.** I was forever trying to write on my lap. That did not work very well. The **temperature of the room sometimes got out of control**, too, because the south-facing windows were covered by Venetian blinds. It did not work well at all. The temperature, you get 30 warm bodies in there, then you run slides, or

whatever's going on, and [laughs] the heat that that would generate, and the room would get so hot. I don't recall any disasters along the way that didn't please us or that we would consider problematic, except the **uncomfortable chairs** that we sat in, in OLLI [Osher Lifelong Learning Institute anyways, [laughs] the chairs were so uncomfortable that a two-hour session just left me physically not charmed. We got bigger spaces, and we got new chairs. The chairs are wonderful now. They're a winner.

Michael: From my side, **I think the content is much more meaningful than the environment.** The environment is very comfortable.

Some classes **they're a little crowded.** Remember chairs they have they get overenrolled. Those things don't bother me. Sometimes we crowded together or scrunched in a little bit, but to me, that's not really conclusive on how I enjoy something.

Grade school] the only time I've really been uncomfortable because the temperature was in Oklahoma when we were still the schools were not

air-conditioned. I like to sit upfront. I do that at church too. I'm a third row person at church. Everybody else gather in the back because I had to train my wife to sit upfront. I feel more like you're involved in something. I have a pretty broad range of temperature comfort. When almost anytime I'm anywhere, someone asked me, "Is the temperature OK?" I usually hadn't thought about it before they asked the question. I will just say, "Yes, fine with me, but if somebody else needs to change it." I don't like to be real cold. **I'd rather be sweating a little bit than be cold.** I really hadn't noticed that the OLLI [Osher Lifelong Learning Institute] temperatures are uncomfortable. I think you have notice that.

Linda: As you get older you **don't see or hear as well.** If you have a more intimate setting, I like that. In the visual line where it's more sharing than just being fed information. The great big auditorium down there, center teared up. Those are awful. [laughs] **It's hard to see in here.** Everyone's on one side, can't see anybody. Lighting, people can't see or hear, **you need good lighting...**depending on the settings that you either need a mic system that works well or/and lighting. PowerPoints are almost...everybody uses PowerPoints. That's

fine. Just have to be able to see well and no glare. **Comfortable seating that is not hard to get in and out.** There are plenty of people that have trouble getting in and out of seats. I can sit on a comfortable sofa or chair. A lot of people can't. I've seen it. They can't get up again. Maybe there should be a choice of seating, seating in need or want. Some people like hard straight-up chairs that are easy to get in and out of. Some people like comfy chairs. Some people want to have a table. It's hard. As we've been talking, **I had a couple of things popped into my mind about spaces where I felt like learning has improved. There would be relatively small settings.** I would say, in that could be 30 or 40, then have to be 20. That's probably too small for what I'm thinking about today. For myself, I used to take notes. I discover, most of the time when I take notes, I never look at them again. I'm just there absorb, what I absorb. I know **a lot people like to have some kind of a desk or table or something.** I don't care. I would be perfectly fine in a more casual, comfortable...**just chairs in a circle.** If you're going to try to accommodate everyone, it would take a lot of different types of classrooms. When you're older, that's the things that matter. You could stick 18-year-olds or 10-year-olds anywhere practically, and they're fine. **It's really important for old**

people to be comfortable and to be able to see and hear. I'd say those are the three most important things. **And temperature.** Old people tend to be cold.

Average AC is way too cold. [laughs] Everybody's bundled up. Keep the rooms a little bit warmer for old folks. If you would keep a room at 68 degrees for a certain population. **You can bump it up two or three degrees for an older population** is what I'm saying and to know to have some expectation of what it's going to be like. You don't have to know whether what kind of classroom.

[laughs] Although almost everyone drags a sweater along, just in case. In the event, you're not in that building. **The vents are in the floors. They're blowing right on your legs. There are a lot of them. They're trying hard to escape.** I would say you don't want heat or air that's going to blow on you directly. Older people don't like physical surprises maybe. **You walk in, and there's nothing but hard wooden chairs.** You think this is going to be fun. [laughs] I'm not going to enjoy this. Uniformity, not that everything in the room is the same, but that each room is somewhat similar, that's what I'm driving at... Yeah, so you're not worried about keeping your legs warm because there's cold air blowing on you.

It's distracting. Little things like that probably make the older people more comfortable.

William: Now as I get older and long in tooth, it's not the greatest place for being **able to hear clearly**. Their physical environment, that building [the Osher Lifelong Learning Institute], I doubt very much was ever intended, necessarily, to be for lifelong learning. It's more for meetings and conferences and so on. The older people...It's not uncommon in those classes to have people in the room say "Can you speak up?" [laughs] **It's not the greatest environment for that**. I know I'm the same way. As I get older. **It's a little harder to hear in those rooms**. I don't think I've ever had a class that somebody hasn't said, "I can't hear it very well." For older people, that gets to be an issue. Old people do the same thing. The ones who have the greatest difficulty hearing or seeing, they'll get up front there. [laughs] That seems, to me, to be the biggest thing. Again, they have the upstairs conference room that's very large. I've had some classes there. For a number of the older students who come, going up those stairs is impossible. **They have an elevator, but it's limited. They can only get a few at a time up there.**

That, for older people, can be a problem. I think a lot of it, as much as anything, is here, the classrooms. **It can be difficult to get between the rows of tables and chairs** for people. **They're a little crowded for people who aren't as steady or agile on their feet.** Again, it varies. The larger classes, like that A conference room that's at the end of the first wing there. Of course, the spaces are such that generally, you can get in and out. Some of the other smaller classrooms, they may be full, the class. What usually happens in that circumstance, once they've figured it out, the **people who have the most trouble arrive about 30 minutes early** [laughs] and get in seats where they get in and out easier. If they arrive later, they can't work their way around there easily. It would be better to have it [screens] other than just the front. There is one room...I can't think of which one is. What they've done is when they have enough people who have enrolled in the class, they open the divider between two rooms. There's a screen in the back of the room as well as at the front. Unfortunately, in the class I took, that would have been ideal. I sit back there. It turned out that the screen malfunctions more often than it works, [laughs] so I didn't get the benefit. **If you get toward the back, it can be difficult to see well the screen.** Again, for people whose

vision isn't as good and hearing isn't good, it'd be nice to have more alternatives.

Old butts get tired sitting on those things [laughs] without a little padding.

Higher, yeah. I played a lot of sports when I was younger. I've had multiple knee

surgeries. I have arthritis in my knees. If it's a little higher, it's easier [laughs] to

get up than if the chair's pretty low. **To accommodate the older, if you had a**

little higher chair, a padded cushion, that would make it much more comfortable

for older students. A little higher, a little softer would be nice, of course. As you

know, most of the chairs there are just those old classroom-type chairs, plastic

frame. The older students, particularly, some of the ladies, they'll show up in

summer class with a winter coat on. **They're freezing.** They have a problem with

that sometimes. **The temperature is a little cold for them.**

Susan:half the women have to go to the bathrooms, and they're in and out

washing their hands, and standing in line and everything.

I was thinking if I had had a wheelchair, or my walker at the time, whenever

they design those places they always put the accessible stall in the very back.

Now how will I have gotten through all those people walking around without

getting knocked over? If you're going to build a new building, would you put it up in the front, please? [laughs] **It's not big enough. That's another thing.** I have a wheelchair here that I said, "I'm going to put it in the back room, and It's going to stay there as much as possible. I'm not going to stay in that thing." However, going down this hallway, where I had to turn, I got stuck. If my husband had not been there, I would not have been able to get around the corners. **If those stalls are not big enough, once somebody was there, they could not turn around and get back out, so they have to be big enough.** That building down there does get cold, but you learn to take a sweater with you. **Sometimes it is cold, but if the subject is good, I can sit through it.** I like the classroom upstairs, where Cal has the classes. Where it is open, and everyone can speak. As far as the sitting arrangements are said, I sit in the back at the last class there, and it is...**When the screen is not up far enough, you see people's heads in the way sometimes.** The only thing I could add wrong with any of the classes was that the screen is too low in the front of the room [laughs] for films, and you have all these heads in the way. You can't see the film. I think that would be for students, young and old. Otherwise, I had no problem with any of them.

Nancy: We had a class with Dean Ray and his students. **What was nice about that is we got to make eye contact.** To see people speak, see their expressions, see their body language when they were speaking. **We had round tables.** It adds a richness to it that if you're in a large class and you're just seeing the back of someone's head when they're speaking, it is not as full an experience as being able to see someone's facial expression. Make eye contact with them. I like that. I understand that's not always possible. **The classrooms are often cold.** People bring sweaters all the time. I don't like that. I don't like the color of the drapes in the OLLI [Osher Lifelong Learning Institute] building, those mauve things. They close the blinds a lot in the big conference rooms, **I'm talking about they close the blinds, and I want to go, "Let's see outside."** No mauve. [laughs] Being able to see.

Joseph: Back to front is what I'm used to, but **I can see how things in a round would be good.** Depends on the subject. If you're going to do

something in the round, then you've pretty much limited this to what kind of... I have to say well I'm going to have to give up my optics if I'm going to put somebody out there with 360 degrees around. Semicircles and stuff, **I like the kind of semicircle, straight up and down is not good for the people in the back usually.** I'm a short guy, so sometimes **it's hard to see.** We may be the closest to the coffee though. If you're in the back [laughter]. This last class we went to is kind of crowded. This last class that I was at. Comfortable, enough space, enough light, and some optics, visual aids.

Betty: If you're **in a horseshoe, you don't have someone's head in front of you** were you want to see the teacher. He can see everybody's face, and from every spot, you can see him. Which I prefer. I've never liked overcrowded...you know where **things are tightly rowed, and you have to scooch in.** That's not conducive to learning in my opinion. **It's never good if it's hot in the room. You get agitated.** Again, I don't like fluorescent lights. **I like windows.** I think it's very important to have

access to water and bathrooms. Really handy to wherever your class is. I think they need to be smaller sized classrooms. I would never do well in the big lectures at OU [University of Oklahoma] where there's 250 people. No. I think smaller venues where you have a little more back and forth with the teacher, where you can break up in working groups with peers to accomplish something, I think that's a better way to go. It's less intimidating, in general, for people who also get to know those peers and build relationships better when you're in smaller groups. **That can help facilitate study groups, partners.** People can learn better because their support system is within the peer group in that class. They're not just hanging in the wind by themselves. I think classes shouldn't be too long. **A three hour class is too long,** it's too much, for me at least. They need to be short where you can get a chunk, but you're not just going away with your brain overfilled where you can't really pull out the highlight that you should be getting because it's way too much information. I don't think it's productive. Not that I'm the least bit opinionated. [laughs] I think that teachers have to be able to speak in a way that's understandable. Their

voice has to be able to carry enough. They need to be able to enunciate well. Otherwise, **if they mumble or if they talk too low, it's a frustrating learning environment.**

Chapter 6

Limitations, Conclusions, Future Research Recommendations

Limitations

The design of this study included a small number of older adults age 55 years to 84 years old, all participating in the Osher Lifelong Learning Institute. The participants were all purposefully sampled based on age, gender and their participation in education in older age. The sample did not represent a diverse group of older life-long learners. Limitations are that participant recruitment was restricted to only those who are enrolled in the Osher Lifelong Learning Institute and who had time and interest enough to participate voluntarily. Findings are limited in informing adult education practitioners about the educational interests and preferences at the Osher Lifelong Learning Institute at the University of Oklahoma in Norman. Findings may be different with regional variations. Some

findings can be translational to other Osher Lifelong Learning institutes, but findings cannot be generalized to represent older adult learners. The design and conceptualization of this study and the interpretation of the narratives is situated within my constructivist perspectives and my own past life and education experiences. This places me into the mix of research participants and similar findings within a different Osher Lifelong Learning Institute may have different interpretation outcomes if performed by a different author.

Conclusions.

The narratives told us more about why older adults participate in the Osher Lifelong Learning Institute (OLLI). The findings also teach us about the education history of OLLI participants but do not directly answer all of the research questions. The findings would warrant to refine and adjust the original research questions to better understand and match what we learned from the analysis of the narratives. The findings do however lead to a better understanding of education interest and experiences older adults report over the lifetime education milestones.

Revising the research question

The adjusted research questions would be:

1. What do older adults who participated in the Osher Lifelong learning Institute report as their lifetime education experiences, their education interest, aspirations, motivations, and educational goals?

The narrative analysis for the original research question two found some surprising answers, but no direct answers to the original question and the predictability of education spaces based on older adults educational interest and perhaps influences for preferences from previous learning spaces. A adjusted second research question addressing the findings of this study would be:

2. What can we learn from older adults education experiences about their preferences for learning environments?

The original questions focused on education interest of participants in their older years. The original two research questions did produce some answers and illuminated some unexpected issues. The findings did get close to answer the adjusted research questions and some of the findings for somebody like me interested in the study of the built environment with a practicing background in

interior design and architecture, are surprising. For example, the learning environment itself is not the primary factor for an older adult in their education experience or education choices.

The following will conclude on the findings of older adults education interest, the educational aspirations, and motivations they have. The conclusions will also address the resulting themes from the analysis, *sociability, reasons [disire] for learning, the perceived barriers and the environmental factors for learning environments.*

Education interest. OLLI students participate in education in their older years because they want to know more about a specific subject matter. One reason why participants enrolled in the Osher Lifelong Learning Institute was apparent in the structural freedom they experience. Older adults can take any subject matter they are interested in without having to worry if their course will fit into a prescribed curriculum. The ability to self-guide and to seek out courses with interesting subject matters has a large impact why they are interested in participating in a life-long learning program. Osher Lifelong Learning Institute participants do not have to deliver homework, and they do not have to study for

exams. Joseph states “Make education convenient, and I’ll grab it.” This quote is exemplary for the decision making and why of many of the participants are interested in education in their older years.

Aspiration. Aspirations in the younger years of the participants focused on the college experience and preparing for a career or are connected to the desire of maturing. In their older years, many participants aspired to broaden their experience or to educate them about *things*. They aspired to their own curiosity or betterment. Participants aspire to get more knowledgeable about the world. Aspirations in their older years are connected to betterment and to grow. Many wanted to understand world events which happened during their college years and which they never completely comprehended in their younger years. Participating in OLLI courses afforded them to connect the missing dots. It is hard to say if the older adult’s education aspiration and experience as a younger person is influencing their older adult educational aspirations directly. Some had negative experiences which they seem to overcome because they are participating in education in their older years. I cannot say why that is, but it is an important aspect we can learn from the findings of this study.

Motivation. Early education experiences and motivations to participate in college education, the older adult personal education history, does not affect the motivation why older adults participate in OLLI. Negative experiences in younger years do not shift the motivation and willingness to participate in education in their older years. Course content and subject matter is typically the main motivator for an older adult to sign up for a specific course and the absence of bureaucracy and complicated enrollment procedures enables older adults to participate with ease.

The group of older adults I interviewed, was very curious about new knowledge, learning new things in a self-directed way. They learn motivated by betterment and for self-gratification. They are more interested in and motivated by the interactive presentation of a topic, in smaller classes with face to face discussion. If a study participant had a previous positive experience in a small class or with a specific professor, and if they rated the professor as excellent, they are likely motivated to return and take “any” subject matter the professor offers. I argue that older adults nominate expertise, presentation style, and interpersonal skills as relevant to make course participation decisions. People seek out classes

which allow for social interactions and discussions. If the class delivery does not provide that, participant use their coffee breaks to satisfy their need for interaction and being social.

Reasons [desire] for learning. Older adult allocate more significant amounts of time toward the pursuit of educational interest and for the sake of personal enjoyment or growth. Seeking out educational experiences for fun rather than for explicit gains provides a different value to these education experiences. Engaging in learning in older years, at least for the cohort participating in my study, is solely based on intrinsic motivation, rather than extrinsic motivation, where rewards are presented, intrinsic motivation provides more meaningful learning, likelihood to follow through on the initial pursuit of knowledge, and experience perceived value of that learning. This is directly tied for example to the importance of reading for pleasure or self-betterment. Many of the study participants have mentioned they do read more in their retirement or they recently developed a love for reading. Whether individuals enjoy reading for the sake of it or if it was previously a difficult task they worked to overcome. The desire to broaden one's view manifests in the broader breadth of interest seeking, which is

partially enabled by unoccupied time. Older Adults get the opportunities to pursue old goals or new hobbies, even if not it is in the way they initially hoped. The direction of education or learning in older years can be reactionary from life experiences or careers as I have read several times in the narratives. Often a career choice or learning direction was chosen because the opportunity presented itself by accident or without an obvious precursor. Education and career choices can be opportunistic. For example, a career lawyer now long past his professional life, is seeking opportunities to learn about horticulture after retiring.

Sociability. Frequently invoked is the desire to “broaden one’s view.” A commonly discussed, and well-known consequence of retirement is a change or diminishment in opportunities for social interactions. This reduced socialization can be augmented through the use of educational spaces. When we consider learning as a social experience, rather than solely an academic resource, a new value on continuing education becomes apparent. The OLLI participants consistently iterate a preference for spaces that provide opportunities for interaction. Though participants certainly indulge old interests and hobbies (a social studies teacher gravitated towards history and politics classes while a

participant with a degree in psychology gravitated towards psychology and social science classes), gaining new knowledge and staying mentally active for the sheer pleasure of it is a significant driver. For example, one participant expressed a general disinterest in the arts, but said he would probably be “interested in that if I had time to get in.”

This “broadening” desired by the participants would not be possible without the social element of the learning space. Conversations with classmates are part of what makes both the educational and social aspects of the space so appealing. Differences in life experience, especially in classes with mixed Osher Lifelong Learning Institute and traditional student participation, foster an exciting and inclusive learning environment. The findings from this experience suggest there is a need for program and policy implications creating such education environments suitable for older adults in a multigenerational setting. The mentioning of multigenerational learning in a classroom and the positive experience resulting from it lead in that direction.

One participant, remarking along the lines of many others, said: “You enjoy the discussion and hearing what other people think about different events.”

Perhaps something to consider in creating learning spaces are spatio-cultural aspects which respect the older adult's journey, even as they return to a familiar (though different) physical and emotional space of enlivened curiosity and freedom.

Retirement, like one's undergraduate experience, could be considered a sort of transitional life phase, rich with new opportunities for growth and self-discovery, even if some of that growth and self-exploration takes place in known environments. Some participants shared a fear of losing the connection to a social cohort once they retire and wanted to plan ahead of retirement augmenting their social life with participation in in lifelong learning. As the older adults participating in my study left their professional lives behind, they rejected the notion of retirement as idleness. Instead, it is a time of new freedom and latitude to pursue old goals or new hobbies, if not in the way they initially hoped. The latitude and time afforded by retirement can amplify self-directed learning trajectories. Participating in lifelong learning and learning new things for many replaces the void many feel when they leave their career. The gerontological literature suggested that many baby boomer retirees will fill the gap their

professional lives leave behind with encore careers and they will train new skill sets and needed knowledge by participating in university-level classes, or they will seek continuing education opportunities. Participants in this study did not return to education or continued to participate in life-long learning in their older years motivated by career aspirations. It seems personal enrichment had a priority over career building at the age they were interviewed. My study participants may not have been the right cohort to find encore career motivations.

Environmental factors. What I've seen suggests that previous learning environments have less of an effect on older adult's preferences for the design of new learning spaces. The change agent and the participant's preferences are directed as their physical needs as older adults change. If a subject matter really interests an OLLI participant or if the predicted quality of instruction by a professor is good, the older adult will accept uncomfortable environmental conditions or deal with environmental barriers. Many stated that they can sit through a lengthy lecture if the content is worth it. One participant suggested, "I would sit on a tree stump to hear this guys lecture." This leads to the conclusion that other aspects, such as sociability, quality of instruction and the interest in the

topic are more critical and deciding influences before environmental factors.

Environments are not dealbreakers for OLLI participants to go to classes.

Barriers. Some participants suggested a desire for flexibility in spaces in order to accommodate a range of needs, impacting the physicality of the older adult. Accessibility and comfortability are factors that older adults take into consideration. At some point, with age, these barriers will become more problematic and may influence the educational goals, and educational experiences older adults seek. Many mentioned that chairs are not so low as to be difficult to get out of, the chairs may have armrests to help them get up from the chair. Some participants mentioned there is not enough space to be able to maneuver between rows with diminished agility. Or that there is not enough desk space for a notebook and a drink. The use of accessible ADA compliant bathrooms and layout or bathrooms, in general, might have to be reconsidered and the findings give some guidance for space planners not to locate the wheelchair accessible stalls at the end of the bathroom. Or to allow for ample room at the wash basins so that congregating users are not in the way for persons who want to enter the bathroom and force people to form a line in front of the bathroom door.

Surprisingly universal design was when restrooms are crowded during the class break. Lighting and sound solutions were sometimes problematic with the need to be inclusive of people with diminished hearing and sight. Windows and the extended view are desired by OLLI participants and mentioned to “improve learning.” Almost everybody had concerns with classrooms being too hot/cold and this was split along gender lines (men too warm, women too cold). Cold air from the floor diffusers was of particular concern and many complaint about “cold air blowing up their legs.”

Furniture layouts in the classroom may be contributors for better interaction and better learning. Round tables, horse shoe or circular configurations allow for better class discussion, and the resulting face to face situation contributes to a better understanding of people, sight to the professor and the increased interaction with peers to discuss content of the course. The round table layout was also mentioned in conjunction with a multigenerational course were OLLI participants and students from the Honors College worked together in a class. The multigenerational class concept was mentioned several times as an

outstanding education experience and something OLLI participants would like to engage in more often.

The availability of snacks or coffee as a welcome perk was appreciated to setting the tone and creating just the right atmosphere in the learning space. The findings of furniture layout, multigenerational learning experiences and having refreshments available in the classroom have potential for a positive impact in traditional learning environments where the face to face interaction or learning exchange across aged might improve learning outcomes.

Past experience, however, proved influential in shaping older adults' desired culture or atmosphere in a learning space but not their preferences in the physical space. The culture or atmosphere of a space may even be more influential and important to an older adult's learning experience than the physical accommodations. Some of participants made remarks along the lines of "I can be uncomfortable for an hour and a half if the content is good." The excitement of learning and the culture of the learning space was powerful enough to keep many in class despite less-than-optimal conditions.

When describing past (especially early) educational spaces, most participants reported on their learning environments with a distinct lack of nostalgia (such as the “one size fits all” educational policies of the 1950s or learning in a one-room schoolhouse in rural Oklahoma). However, there is a discrete break when they describe their undergraduate experience if they went to college. College environments were described as “inspiring” and being spaces of significant personal discovery and growth. Being on a college campus for Osher Lifelong Learning classes helped some participants to “feel young again.” This youthful energy could also heighten and improve learning experiences, diverse, intergenerational classes where participants study alongside current university students were noted to be especially enriching.

Many of the findings support and confirm the theoretical framework of positive aging discussed in this study. The markers supported by the study findings include:

1. Sociability
2. Keeping active and healthy, brain health
3. Friendships and the opportunity for learning

The concept of elderhood can be further explored as a defined part of positive aging, where elderhood is essential in crafting opportunities unique and relevant to this life period. Considering the power of words, elderhood is potent enough to shift the negativity around words associated to senior citizen, elderly and the like.

Future research recommendations

While this study focuses on the education experiences of older adults participating in the Osher Lifelong Learning Institute, future studies might consider a focus on participants outside of this group, inclusive of a much diverse and larger pool of participants. For example, in this study, all of the participants are affluent white participants of the Osher Lifelong Learning Institute. Such an approach could capture an older adult population in life-long learning or in university settings, degree and non-degree seeking. My assumption is that older adults draw a line between learning for pleasure and learning to support an encore career which may require a formal degree.

A future study conceptualized on life-long learning as it relates to self-gratification could develop a survey protocol from the directions learned in this study. The number and the diversity of participants still must be much more

significant. The representation in this study was limited to a small subset of the older adult population engaging in life-long learning at an Osher Lifelong Learning Institute. The demographics of the participants was narrow. A survey instrument with the aim of quantitative analysis could focus on spatio-cultural aspects of learning spaces and how they can be enabled through design elements. A survey instrument would allow increasing the number of participants significantly. Other elements not able to investigate through the design of my study are gender differences in education aspirations, the desired education culture or atmosphere of a learning environment which older adults may seek, or how we engender such an education culture in a physical space. Similar research could be conducted for a more diverse group of participants, or older adults who are degree-seeking in higher education understand better their policy and procedure needs to guide their acceptance into the institution, enrollment and advising needs. The literature indicates that we already see increased demand from older adults to return to universities to seek continuing education at the university level or a university degree. There are different papers foreseeable from the findings and outcomes of this study to inform:

1. Osher Lifelong Learning Institutes across the country
2. Inform elder hostels and their procedures and processes
3. Inform other programs that serve aging adults education

In future research, the construct of sociability, preferences, experiences, and barriers (SPEB) has potential to program and understand what is necessary to older adults in education. Tables 12 and 13 support SPEB conceptually. Future research can a developing a matrix representing sociability, preferences, environments, and barriers and investigate how education interest, aspirations, and motivations can align with the themes analyzed in this study.

The findings allow for a lot of issues to be explored by other disciplines using a different angel and view. Potential research projects in different fields based on these findings include:

1. Higher Education
2. Expanded continuing education
3. Psychology
4. Gerontology
5. Interior Design, including universal design for learning environments

6. Women and gender studies

Life-phases and aspirations. Figure 3 illustrates the broad educational milestones and life-phases of the Osher Lifelong Learning Institute participants. The addition of the diagram and the inclusion of the future research recommendations indicates the potential education life milestones have. The addition of this section helps to better understand the inherent inter-weaving of education aspirations and life phases or educational milestones and will support my arguments for future research opportunities. The included notion of the later phase of education milestones and the notion of education in older years to support and assist the older adult's children and grandchildren has a lot of potential.

Figure 3
Life-phases, milestones sunburst

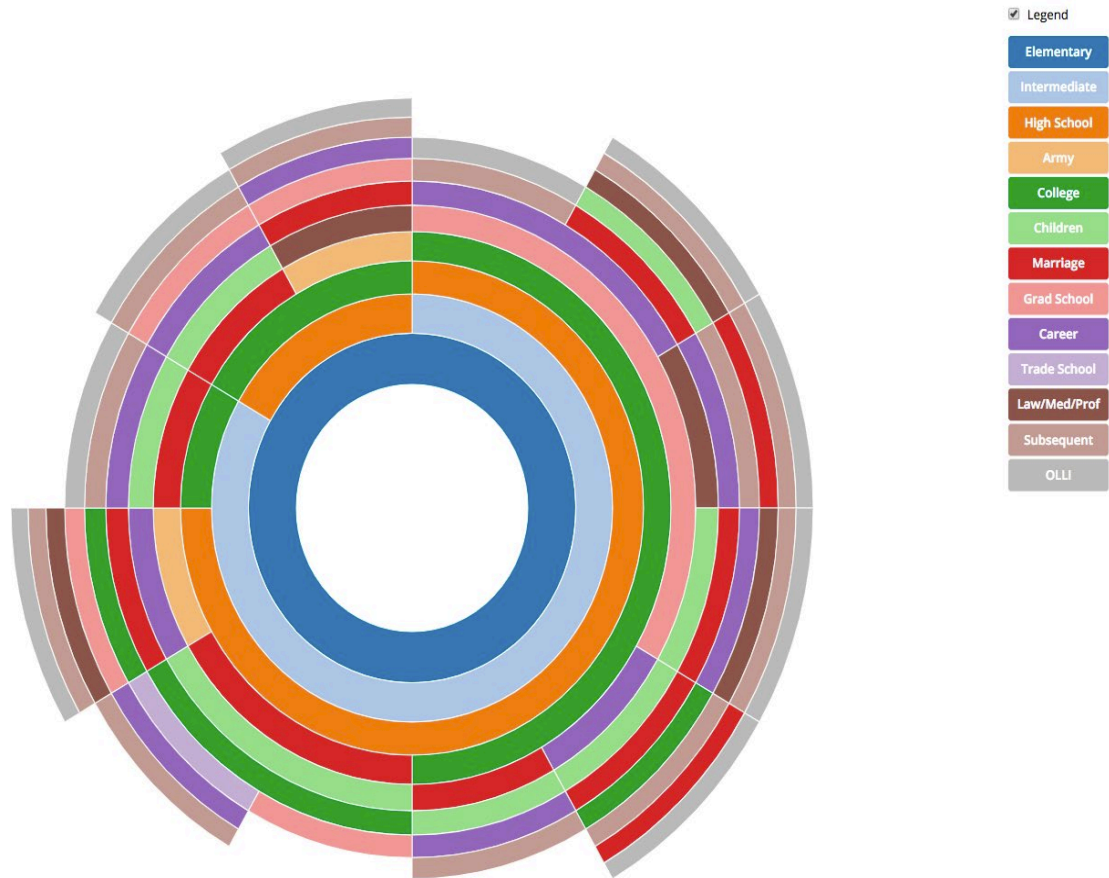


Figure 3

Each of the twelve slices represents a study participant, and each ring indicates a life phase.

It is possible to identify parallels in life milestones of study participants consisting of significant education milestone transitions. Those transitions, for

example, are indicative of going away to college or retiring from a professional career or from being a homemaker. The indication of the milestone relative to their life-phase is a marker suggesting abundant opportunities for gaining self-knowledge and exploring educational interests. Such opportunities provide the means to engage in lifewide learning. Lifewide learning occurs within life periods of self-directed education, either motivated by the interest of the older adult or by demand in the workplace. Engaging in professional development or self-directed learning may not be realized as education, for example, reading or learning skills for life. Participants narratives point in that direction “Law school was different it changed your career life; undergraduate school changed your personal life.” Many of the participants in my study reported they enjoyed the self-identifying aspect and the developing love for knowledge in their undergraduate education and they can connect those experiences with the Osher Lifelong Learning Institute.

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APPENDICES

Appendix A: INFORMED CONSENT FORM**Signed Consent to Participate in Research****Would you like to be involved in research at the University of Oklahoma?**

I am Hans Peter Wachter from the Interdisciplinary PhD Program at the University of Oklahoma and I invite you to participate in my research project entitled “Exploring Educational Interests and Preferences for the Design of Learning Environments among Older Adults Living Independently in Community Settings”

This research is being conducted at The Life Long Learning Institute at the University of Oklahoma. You were selected as a possible participant because you meet the criteria of the investigated population, still living independently and being active in the community and a member of the Life Long Learning Institute at the University of Oklahoma.

Please read this document and contact me to ask any questions that you may have BEFORE agreeing to take part in my research.

What is the purpose of this research? I will study older adults in the age range from 50 to 89 years who are also members of the Osher Lifelong Learning

Institute, a program that provides educational opportunities with non-credit courses, and is associated with universities as sponsors of informal learning for older adults throughout the United States. Older adult participants are still active in community life and living independently. Given my review of relevant literature, and the gaps I have identified, I am interested in the elderly's educational interests originating from their educational aspirations and forming their educational goals, and the preferences the elderly have for learning environment qualities and to explore relationships and how they inform the design of learning environments fulfilling the elderly's learning aims.

How many participants will be in this research? About 30 people will take part in this research in individual interviews.

What will I be asked to do? If you agree to be in this research, you will meet with Hans-Peter Wachter at the OSHER Lifelong learning institute for an approximately 60 minute interview with open questions about your past educational experiences, your educational aspirations and your perceptions of education environments that suit your education goals. You will have to sign the consent form if you agree to participate before the interview begins.

How long will this take? Your participation will take approximately 60 minutes and you can terminate the participation at any time.

What are the risks and/or benefits if I participate? There are no risks and no

benefits from being in this research.

What do I do if I am injured? If you are injured during your participation, report this to a researcher immediately. Emergency medical treatment is available.

However, you or your insurance company will be expected to pay the usual charge from this treatment. The University of Oklahoma Norman Campus has set aside no funds to compensate you in the event of injury.

Will I be compensated for participating? You will not be reimbursed for your time and participation in this research.

Who will see my information? In research reports, there will be no information that will make it possible to identify you. Research records will be stored securely and only approved researchers will have access to the records.

You have the right to access the research data that has been collected about you as a part of this research. However, you may not have access to this information until the entire research has completely finished and you consent to this temporary restriction.

Do I have to participate? No. If you do not participate, you will not be penalized or lose benefits or services unrelated to the research. If you decide to participate, you don't have to answer any question and can stop participating at any time.

Will my identity be anonymous or confidential? Your name will not be retained or linked with your responses unless you specifically agree to be identified. The

data you provide will be destroyed unless you specifically agree for data retention or retention of contact information at the end of the research. Please check all of the options that you agree to:

I agree to being quoted directly. Yes No

I agree to have my name reported with quoted material. Yes No

I agree for the researcher to use my data in future studies. Yes No

Audio Recording of Research Activities To assist with accurate recording of your responses, interviews will be recorded on an audio recording device. You have the right to refuse to allow such recording without penalty. “If you do not agree to audio-recording, you cannot participate in this research.”

I consent to audio recording. Yes No

Will I be contacted again? The researcher would like to contact you again to recruit you into this research or to gather additional information.

I give my permission for the researcher to contact me in the future.

I do not wish to be contacted by the researcher again.

Who do I contact with questions, concerns or complaints? If you have questions, concerns or complaints about the research or have experienced a research-related injury, contact me at hepw@ou.edu or my cell phone number 1 405.570.1093 or my faculty advisor Dr. David Moxley at david.moxley@ou.edu or his cell phone

number 1 405.250.4156

You can also contact the University of Oklahoma – Norman Campus Institutional Review Board (OU-NC IRB) at 405-325-8110 or irb@ou.edu if you have questions about your rights as a research participant, concerns, or complaints about the research and wish to talk to someone other than the researcher(s) or if you cannot reach the researcher(s).

You will be given a copy of this document for your records. By providing information to the researcher(s), I am agreeing to participate in this research.

Participant Signature	Print Name	Date
Signature of Researcher Obtaining Consent	Print Name	Date

Hans-Peter Wachter

Recruitment email. Exploring educational interests and preferences for the design of learning environments among older adults living independently in community settings

I am a graduate student at the University of Oklahoma in the interdisciplinary Doctoral program, and I am conducting a study to fulfil the requirements of my dissertation. The study concerns the motivations, aspirations of older adults to engage in education and the perceptions they have of education environments, and involves interviews approximately 60 minutes long with older adults 50 to 89 years old. I am looking for participants who are active in their community, live in their community dwellings and are interested in life-long learning. I would be very grateful if you would be willing to take part in my study. If you are interested, please contact me at the email address below. If you have further questions about this study or your participation, please contact me at the email address below. If you do so, you will have the chance to find out more about the study before coming to any decision. You would be under no obligation to take part. There will be no compensation for your time to participate in this study. I have attached a consent form for you to read through and to accommodate your decision making. If you decide to participate in the study, you will have to sign the consent form before the interview can take place.

My study is supervised by Dr. David Moxley and he can be contacted at david.moxley@ou.edu. The use of email to recruit participants for this study has been approved by the Internal Review Board.

Hans-Peter Wachter, PhD Candidate
hepw@ou.edu

Appendix C: SEMI-STRUCTURED INTERVIEW GUIDE

1. What are your education experiences as an older adult? Or if you like, you can go back as far as you want.
 - 1.1. Are there good or bad experiences during that time?
2. What are your education interests?
3. What are your education aspirations now?
 - 3.1. Are they different over time?
4. What are your education motivations now?
 - 4.1. Are they different over time?
5. Do you have education goals now?
 - 5.1. Are they motivated by your aspirations?
6. When you think of education spaces/environments, are there conscious preferences for the environment?
 - 6.1 or environmental factors you do not like?

Appendix D: INITIAL RESEARCH QUESTIONS AND ASSUMPTIONS

My principal assumptions are:

1. Positive aging enables older adults to form a life space in their older years
in support of their educational interests linked to their educational goals.
2. Older adults will assign to their educational interest's considerable priority
thereby imbuing educational opportunities with importance for them
during a period once reserved almost exclusively for retirement.
3. Among older adults there is a growing interest in encore careers and most post-
secondary and higher education institutions will increasingly recognize
these interests and provide access to a variety of settings in which older
adults can shape those careers.
4. Older adults have specific educational interests, goals and preferences in later life
which may emerge from their prior education experiences and their
aspirations across the lifespan.

Secondary Research questions are:

What do older adults report as their education aspirations.

What are their interests in education and lifelong learning.

What do they see as their education goals.

How do their aspirations and interests formulate goals and influence older adults
preferences in learning.

What are the influences for the design of learning environments.

What do older adults identify as challenges and barriers in participating in
education in their older years.

What environmental qualities or affordances do older adults seek to
support their learning.

VITA

Hans-Peter Wachter M.Arch, Dipl Ing. Interior Architect (Germany)
 ASID, IDEC, NCIDQ, LEED AP, CAPS, GREEN AP
 Professor of Interior Design

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 The University of North Texas
 College of Visual Arts and Design
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 Email: hepi.wachter@unt.edu

Academic Background

1991 State Academy of Arts Düsseldorf, Germany, Post Graduate
 Studies, Master of Fine Arts,
 1989 State Academy of Arts Düsseldorf, Germany, Master of
 Architecture, Master Studio of Sir James Sterling and O.M
 Ungers, MArch
 Graduation with summa cum laude (“Meisterschüler”
 awarded by President Marcus Lüperz)
 1986 University of Applied Science, Rosenheim Germany,
 Bachelor of Interior Architecture, BID

Academic Positions

2017-pres. Professor, Department of Design, College of Visual Arts and
 Design, University of North Texas
 2013-2017 Adjunct Associate Professor, Liberal Studies, College of
 Liberal Studies, University of Oklahoma
 2010-2017 Adjunct Associate Professor, OU Health Science Center OKC
 Donald W. Reynolds Department of Geriatric Medicine
 2002-2017 Affiliated Associate Professor of Architecture, College of
 Architecture
 University of Oklahoma
 2005-2017 Associate Professor of Interior Design
 College of Architecture, University of Oklahoma
 2003 - 2005 Associate Professor of Interior Design, renewable term,
 College of Architecture, University of Oklahoma
 2002 Affiliated Assistant Professor of Interior Design
 College of Architecture, University of Oklahoma

2001 - 2002 Visiting Assistant Professor of Interior Design
College of Architecture, University of Oklahoma

Administrative Positions

2017-pres. Department Chair, Department of Design, College of Visual Arts and Design, University of North Texas
2010-2016 Graduate Liaison, Division of Interior Design, College of Architecture, University of Oklahoma

Professional License and Certifications

2013 *Greenleaders Green Accredited Professional* certification
2010 Certified Aging in Place Specialist (CAPS), NAHB
2009 Leadership in Energy and Environmental Design, LEED Accredited Professional (LEED AP) #0902
2004 National Council for Interior Design Qualifications, (NCIDQ) Interior Design Qualification Exam **Certificate # 019718**
1995 Architect, State licensure in North Rhine-Westphalia, Germany **Registration # A 28952**
1995 Interior Architect, State licensure in North Rhine-Westphalia, Germany
Registration # I 2041

Industry Experience

2004-2017 Design consultant, National Postal Training Center and Marriott Convention Center Norman Oklahoma.
1996-2003 setUp International Ltd., sole proprietor, architecture, planning and construction management for residential, civic and commercial projects, healthcare design, exhibition design,
1990-1996 Dragon International Ltd., Principal/Partner, architecture, planning and construction management for residential, civic and commercial projects, healthcare design, exhibit design
1986-1990 Haus Rucker Co., architecture, planning and construction management, civic and commercial projects, healthcare design,

Professional Service and Professional Membership

2016-2019 President Interior Design Educator Council (IDEC)
2016-2018 Interior Design Educator Council (IDEC), Chair
Environmental Gerontology Network

- 2013-2015 Interior Design Educator Council, SW Region Chair,
2011-2013 International Interior Design Association, Oklahoma City
City Council, Membership Chair
- 2010-2011 International Interior Design Association, Oklahoma City
City Council, Programs Co-Chair
- 2004-2011 International Interior Design Association (IIDA), Texas-
Oklahoma Chapter Board of Directors
- 2009 Interior Design Educator Council (IDEC), Scholarship
Dissemination Task Force
- 2009-2014 Interior Design Educator Council (IDEC), Chair Integrated
Practice inside-out network
- 2008-2014 Oklahoma Interior Design Coalition, Member Board of
Directors
- 2008-2016 Reviewer, Fairchild Books; proposal review Concept
Development and the Design Process, proposal review
Human Factors for the Built Environment; proposal review
Space Planning for Commercial Interiors, proposal review
of *Designing for C2C home: Examining a Design Process for
the Built Environment through Education and Experience*,
proposal review *Interior Construction; Design Process and
Concept Formation*,
- 2008 Interior Design Educator Council (IDEC), International
Committee
- 2007 Texas Tech, Department of Interior Design, invited
sophomore admission reviewer
- 2007 Interior Design Educator Council (IDEC), Publication
Submission Task Force
- 2006 University of Texas, Austin TX
Department of Interior Design, invited studio visit and
review studio critique
- 2006 International Interior Design Association, Oklahoma City
City Council
Member Council Board
- 2005-2008 Rotary International, Norman Club, Board of Directors,
Chair Community Service
- 2005 University of Applied Science, Potsdam Germany,
Department of Architecture, invited studio visit and
reviewer
- 2004-2009 International Interior Design Association, Texas-Oklahoma
Chapter
Member Board of Directors

- 2004 Kansas State University, Department of Interior Architecture, invited studio visit and reviewer
- 2004-pres. Interior Design Educator Council (IDEC) Professional Member
- 2003-2010 Oklahoma Interior Design Coalition, Board of Directors
- 2003-pres. Rotary International, Paul Harris Fellow
- 2003-2009 American Institute of Architects (AIA), Associate Member
- 2002-2018 American Society of Interior Design (ASID) Professional Member

Extra-Curricular University Teaching

- 2018 University of North Texas, Study Abroad Program
Germany: Culture and Design
- 2013-2017 University of Oklahoma Education Abroad Program
Germany: Health Culture Design
- 2010-2012 Osher Lifelong Learning Institute at *The University of Oklahoma*. “Aging in the community, reflections and discussions” and “The Norman Aging Needs Assessment”
- 2009-2015 Osher Lifelong Learning Institute at The University of Oklahoma, “Color Matters” and “Color Harmonies”
- 2005 Summer Quarter, The Art Institute Online, Pittsburg, basic drafting online studio,

Thesis committees, Independent Studies, Healthcare Design Studio projects

- 2016-2017 Doctorial Committee, Ammara Arshad
- 2014-2017 Doctorial Committee, Michael Garland
- 2014-2015 Graduate Theses Committee; Supak Inthasoi
- 2013 Graduate Theses Committee; Tracy Howard
“An Interior Designer’s Perspective of Global Sustainability with Respect to Economic, Social and Environmental Benefits”
- 2013 Graduate Thesis Committee; Christie Jones
“Comparison of two different subway car layouts in the New York City Transit System to analyze crowding patterns in relation to seating arrangements”
- 2013 Undergraduate Research Opportunity Program, Honors College, University of Oklahoma; Kim Retzsch “Cultural Variables in Interior Design”
- 2012-2013 Graduate Theses Committee; Manojkamar Venkatesan
“Eye Hospital in Chennai”

- 2012 Studio Project, 4th year Interior Design, 3rd year architecture at Texas A&M Texas, 5th year architecture at the South East University Architecture studio, Nanjing China *“Cancer Rehab Center”*
- 2012 Studio Project, 4th year Interior Design, *“Sunrise Healthcare Provider”*
- 2011 Studio Project, 4th year Interior Design, 4rd year architecture at OU, 3rd year architecture at Texas A&M Texas, 5th year architecture at the South East University Architecture studio, Nanjing China *“Eye Hospital in Punjang”*
- 2011 Studio Project, 4th year Interior Design, *“Healthcare Insurance Provider, Administration Office”*
- 2010 Graduate Theses Committee; Chris Coombs
“Cardiac Center: heart disease, cardiovascular treatment and prevention”
- 2010 Graduate Theses Committee; Wendy Zhe
“A sustainable general hospital design in US”
- 2010 Studio Project, 3rd year Architecture, 3rd year Interior Design *“Senior Wellness Center OKC”*
- 2009 Urban Design Studio Tulsa, Theses Committee Nathan Kunz, David Beach, Nathan Diekelman, Brent Isaacs, Shannon Green,
- 2009 Arch 4990 Independent Study, Kirk Williams, *“Using gaming software in design presentations”*
- 2008 Studio Project, 3rd year Architecture, 4th year Interior Design *“Duncan Pediatric Clinic”*
- 2008 Studio Project, 3rd year Architecture, 4th year Interior Design *“Natal Intensive Care Unit and Pediatric Clinic Model for Africa”*
- 2008 Arch 4990 Independent Study, Yale Kim, *“Acoustic Ceiling Elements in a Healthcare setting”*
- 2007 Architecture Graduate Thesis Committee, Ali Farzaneh
- 2007 Undergraduate Research Opportunity Program (UROP) Sponsor of Patrick Andrews *“Wayfinding for Alzheimer Patients”*
- 2007 Arch 4990 Independent Study, Robert McClain, *“Modular Furniture”*
- 2006 Undergraduate Research opportunities Program (UROP) Sponsor of Eric Gonzales *“The Design Process”*
- 2006 Arch 4990 Independent Study, J.D. Clark *“The Wedding”*

- Arbor”
- 2006 Architecture Graduate Thesis Committee, Brett Johnson
 2005 Arch 4990 Independent Study, Eric Gonzales
 2005 Undergraduate Research Opportunity Program (UROP)
 Sponsor of Alison Armstrong “*Color assisting Alzheimer Patients*”
- 2004 Architecture Graduate Thesis Committee, Teok S. Kho
 2003 Architecture Graduate Thesis Committee, Young Kyu Ham
 2002 Architecture graduate Thesis Committee, Martha Norbeck
 2001 Studio Project, 4th year Interior Design “*Pediatric Clinic*”

Peer reviewed presentations, proceedings publications, journal articles, exhibits

- 2016 **Wachter H.P.**, Keesee, M., Holliday, L., “Evaluating School Building User Needs”, Journal of Civil Engineering and Architecture Research,
 2016 **Wachter, H.P.**, “Cognitive Health, Education and Adult Development”, International Journal of Education and Human Development,
 2016 **Wachter, H.P.** “Making Places: Environmental Gerontology”, proceedings of the Athens Institute for Education and Research, International Conference on Architecture, Athens, Greece.
 2016 **Wachter, H.P.**, Gaines, K., Perritt, M., Park, P., “Places for People of all Ages”, proceedings of MetroCon, Dallas TX
 2016 **Wachter H.P.**, Holliday, L., Keesee, M., “Wish Lists and Trade-offs: Planning Safe and Healthy Schools”, 6th International Conference on the Constructed Environment, Tucson, AZ
 2016 **Wachter H.P.**, “Motivations and aspirations of adults 50 to 89 years of age suggesting their educational goals in later life” Proceedings of the Association for Gerontology in Higher Education, Annual Meeting, Long Beach CA
 2015 Bhattacharjee, S., **Wachter H.P.**, “Age related Symptoms of Indoor Environmental Qualities” proceedings of the Society for Public Health Education Annual Meeting, Portland OR
 2015 **Wachter H.P.**, Hoehn C., “Building Next-Generation Schools” American Association of School Administrators, School Administrator Vol.72 (10)
 2015 **Wachter H.P.**, “Wedge”. Proceedings of the Interior Design Educator Council SW Region Conference, Fort Collins, CO

- 2015 Gaines, K., **Wachter, H.P.**, Perritt, M., Park, P., “Evidence Based Healthcare Design: Implications for Practice”, proceedings of MetroCon, Dallas TX
- 2015 Bhattacharjee, S., **Wachter H.P.**, “Relationships Between Health Symptoms and Indoor Air Qualities Of Different Age Groups”, proceedings of Healthy Buildings Europe, Eindhoven, Netherlands
- 2015 **Wachter H.P.**, Holiday, L., Hoehn, C., “Reinventing The Balance For School Safety with Other Requirements in Today’s School Design”, proceedings of EdSpaces, International Conference, New Orleans, LA
- 2015 **Wachter H.P.**, Holiday, L., Hoehn, C., Walter, R., “ Building Safe and Healthy Schools” . Educational Facility Planner, Vol 48,(2,3) pp47-51
- 2015 **Wachter H.P.**, Hoehn, C., Holiday, L. “Influence from the Outside: How School Planning can Benefit When Advisory Boards, Research Universities and Government Funding Agencies Together Discuss Points of Views”, proceedings of the Council of Educational Facility Planners International Conference, San Diego, CA
- 2015 **Wachter H.P.**, “Shifting Access: Needs of the Elderly non-Traditional Learner in Higher Education and Formative Degree Programs” Proceedings of the Association for Gerontology in Higher Education, Annual Meeting, Nashville TN
- 2014 Holiday L., **Wachter H.P.**, Hoehn C., “Balancing School Safety with other Design Parameters in Today’s School Designs” Council of Educational Facility Planners International Conference, Portland Oregon
- 2014 **Wachter H.P.**, “The Elderly Student in Higher Education: Informal and Formal Degree Programs”, 6th Asian Conference on Education, Osaka Japan
- 2014 **Wachter H.P.**, Brown J., Hoehn C., “Creating Learning Environments: Learnscape 1.0”, 5th International Conference on the Constructed Environment, Philadelphia, PA
- 2014 Mohr C., **Wachter H.P.**, Perritt M., Gaines K., “Expanding the Body of Knowledge. Graduate Studies for the Interior Design Profession”, MetroCon, Dallas Texas,
- 2014 Ellis N., **Wachter H.P.**, “ Creating Making: Theory, Modeling and Synthesis to Build: Theorizing the Studio Curriculum”,

- Southwest Regional Interior Design Educator Council
Conference, Fayetteville, Arkansas
- 2013 Boeck D, Moxley D, **Wachter H.P.**, “Linking Positive Emotion to Design Students’s Creative Process: Entry Memories and Their Connection to the Design Process” proceedings of the 7th International Conference on Design Principles and Practices, Chiba Japan
- 2013 **Wachter,H.P.**, “Working with Design Principles to Break Down Communication Barriers between Multidisciplinary Design Teams” proceedings of the 7th International Conference on Design Principles and Practices, Chiba Japan
- 2013 **Wachter H.P.**, Zhipeng L., Ying Z., Mann G., “13-Hours Difference: Lessons Learned from the China-U.S. Joint Design Studio” proceedings or the UAI/PHG 2013 Annual Healthcare Forum, Toronto Canada
- 2013 Moxley, D., **Wachter H.P.** “The Iconic House in Positive Aging: Challenges and Possibilities for Understanding the Concept of Home in Aging in Place” Waikiki Hawaii, accepted to the 2013 Hawaii International Conference on Arts and Humanities.
- 2013 Boeck,D; **Wachter H.P.**; Moxley, D. “The Healthful and Helpful House in Positive Aging: Possibilities for the Development of a Local Prototype and Model” proceedings of EDRA 44, Environmental Design Research Association Conference, Providence RI
- 2013 **Wachter H.P.**, “Are We International Enough? What Constitutes an International Professional Association? Questions along IDEC’s Journey” Interior Design Educator Council National meeting, Indiana IN,
- 2013 **Wachter H.P.**, “Prototyping a Conceptual Environmental Model for Aging in Place” Interior Design Educator Council National meeting, Indiana IN,
- 2013 **Wachter, H.P.** “Working with Design Principles to Break Down Communication Barriers between Multidisciplinary Design Teams in a Healthcare Design Setting”, accepted for presentation and publication, 7th International Design Principles and Practices Conference, 2013 Chiba Japan
- 2012 **Wachter, H.P.**, Mann, G., McGraw, J., Boeck, D., “Collaborating Across Institutions, Integrating Interior Design and Architecture in a Healthcare Design Project”

- College of Architecture, Pioneering Knowledge in the Planning, Design and Construction Disciplines, proceedings of the University of Oklahoma Research and Creative Activity Day, Norman OK
- 2012 **Wachter, H.P.**, “Evidence Based Learning: Three Institutions and Three Teaching Firms Together Empower Students to Succeed in a Healthcare Design Setting” proceedings of the 37th Annual International Improving University Teaching Conference, Innsbruck Austria
- 2012 Mann, G., **Wachter H.P.**, Huong, X., “China: Toward Improved Health Care and Health Facilities in the Future” 32th International Union of Architects Public Health Group Seminar, March 22- 24 Oslo, Norway
- 2012 Hoehn, C., **Wachter, H.P.**, “The Art and Science of Design Education in a New College of Architecture” proceedings of the 37th Annual International Improving University Teaching Conference, to be held in Innsbruck, Austria
- 2012 Moxley, D., **Wachter, H.P.**, Boeck, D., Bishop, J., Rosenthal, C., “The Community Environmental Design Research Exhibit with a Substantive Focus on Aging: Prototype, Trial Use and Proof of Concept” proceedings of EDRA 43, Environmental Design Research Association Conference, Seattle WA
- 2012 **Wachter, H.P.**, Mann, G., Schaefer, S., Boeck, D., “Empowering students through collaboration across institutions: A community health design studio” proceedings of the 50th Interior Design Educator Council annual conference, Baltimore MA
<http://2012.idec.org/empowering-students-through-collaboration-acr>
- 2011 Bishop, J., Moxley, D. **Wachter, H.P.**, Boeck, D., (January 2011) “Use of Photovoice to Document Environmental Inequities in the Life of an Older Adult with Functional Mobility Concerns”, accepted to the 2011 Art and Design for Social Justice Symposium, Tallahassee, FL
- 2011 Boeck, D; Moxley, D. **Wachter, H.P.**, (January 2011) “The infusion of the arts and humanities into a community needs assessment of aging: Rationale guiding the environmental design exhibit in Norman, Oklahoma” Waikiki Hawaii, accepted to the 2011 Hawaii International Conference on Arts and Humanities.

- 2011 Boeck, D; Moxley, D. **Wachter, H.P.**, (January 2011) “if I were a door: the importance of emotion and entry memories and their relationship to design students creative process” Waikiki Hawaii, accepted to the 2011 Hawaii International Conference on Arts and Humanities.
- 2011 **Wachter, H.P.**, Moxley, D., Boeck, D, (June 2011) “Translating the Values of the Humanities into a Community Environmental Design Exhibit” 9th International Conference on New Directions in the Humanities, Universidad de Granada, Campus La Cartuja, Granada, Spain
- 2010 **Wachter H.P.**, (October 2010) “Visualizing Design and Participatory Presentation: Exploring Advanced Presentation Techniques” Interior Design Educator Council (IDEC) South West Conference, Fayetteville Arkansas, proceedings of the 2010 South West Conference of the Interior Design Educators Council
- 2010 **Wachter, H.P.**, Boeck, D, Moxley, D. (October 2010) “The Relevance of Participatory Action Research (PAR) Strategies for Understanding How Environmental Design Inequities Influence the Well-Being of Older Adults” Faces of Urban Health A Forum to Share Community-Based Strategies to Address Health Inequity in Urban Communities, New York City
- 2010 **Wachter, H.P.**, Boeck, D, Moxley, D. (October 2010) “Taking it to the Street: Community Health and Economic Development “, Proceedings of the Sixth Annual Design Research Conference: Designing Health, Spokane Washington
- 2010 **Wachter, H.P.**, Boeck, D, Moxley, D. (October 2010) “Designing Health: Aging Needs Assessment and The Environment for Positive Aging in a Midwest City”, Peer reviewed proceedings of the Sixth Annual Design Research Conference: Designing Health, Spokane Washington.
http://spokane.wsu.edu/academics/Design/ResearchService/focus_week/designinghealth6thDRConfProceedings.pdf
- 2010 Boeck, D, **Wachter, H.P.**, (September 2010) „Developing ad Common Design Vocabulary within a Multi-Disciplinary Design Studio” Proceedings of the 15th Biannual Conference of the Design Communication Association, Bozeman Montana

- 2010 Boeck, D, **Wachter, H.P.**, (June 2010) “Teaching Collaboration in Design Studio Utilizing Integrated Delivery Methodology” Proceedings of the 41st Annual Conference of the Environmental Design Research Association EDRA, Washington, DC
- 2010 **Wachter, H.P.**, Boeck, D, Moxley, D. (June 2010) “Aging Needs Assessment Project: The Community and Positive Aging” Proceedings of the 41st Annual Conference of the Environmental Design Research Association EDRA, Washington, DC
- 2010 **Wachter, H.P.** , Boeck, D, (March, 2010) “Changing the Paradigm: Multidisciplinary Teaching in Design”, Interior Design Educators Council (IDEC), 47th International Conference, Atlanta, GA, proceedings of the 2010 International Conference of the Interior Design Educators Council
- 2010 **Wachter, H.P.**, Bock, D, (January 2010). “Teaching Healthcare Design Utilizing Integrated Delivery Methodology” Waikiki Hawaii, proceedings of the 2010 Hawaii International Conference on Arts and Humanities
- 2010 **Wachter, H.P.**, Williams, S, (January 2010). “Design is Invisible” Waikiki Hawaii, proceedings of the 2010 Hawaii International Conference on Arts and Humanities
- 2009 **Wachter, H.P.** (2009). “*Design is Invisible*” Norman Arts Council and Dreamer Concepts, Sculpture and mixed media art installation and exhibit at Dreamer Concepts, Norman OK, May 8th to May 29th 2009, juried exhibition
- 2008 **Wachter, H.P.** and Williams, S. (October 2008). “*Wait wait, I will have it done tomorrow: Does a major with creative thinking requirements foster procrastination?*” Interior Design Educator Council (IDEC) South West Conference, Boulder Colorado, proceedings of the 2008 South West Conference of the Interior Design Educators Council
- 2008 **Wachter, H.P.** (February 2008) “*Civic Responsibility: Service Learning as Integral Part of a Furniture Design Studio*”, Illinois Online Conference for Teaching and Learning, Illinois Champaign, proceedings of the 2008 IOC conference
- 2008 **Wachter, H.P.**, (October 2008). “*Expressions are endless, unless I have to express them in nine design books*”,

- Interior Design Educator Council (IDEC) Pacific West Conference, Bozeman Montana. Proceedings of the 2008 Pacific West Conference of the Interior Design Educators Council
- 2007 **Wachter, H.P.** (2007). "*sun sponce*" Design Communication Association Conference (DCA), Drawing Exhibition, Muncie Indiana, proceedings of the 2007 Design Communication Association Conference
- 2007 **Wachter, H.P.** (March, 2007) "*online interior design studio: access and student experience*", Interior Design Educators Council (IDEC), 44th International Conference, Austin TX, proceedings of the 2007 International Conference of the Interior Design Educators Council
- 2007 **Wachter, H.P.** (2007). "*The assessment of a strategy using visual stimulation to promote inspiration within the built environment of a design school*", *History, Community and Culture: Celebrating Tradition and Transforming our Future*, selected readings edited by R. Griffin, M. Avgerinou and J. Giesen, 170-176,
- 2007 **Wachter, H.P.** (January, 2007). "*First time online interior design studio: Evaluating student experience*", Illinois Online Conference for Teaching and Learning, Illinois Champaign, proceedings of the 2007 IOC conference
- 2006 **Wachter, H.P.** (October, 2006). "*The assessment of a strategy using visual stimulation to promote inspiration within the built environment of a design school*" paper presentation, International Visual Literacy Conference, Fort Worth TX
- 2006 **Wachter, H.P.** (October, 2006). "*Service Learning: Interior Design as Means of Giving; How a furniture design studio is teaching students to give back to the community*" Interior Design Educator Council (IDEC), South Region Conference, Greensboro NC, proceedings of the 2006 South Region Conference of the Interior Design Educators Council
- 2006 **Wachter, H.P.** (October, 2006). "*Student experience in an online interior design studio*" paper presentation, Interior Design Educator Council (IDEC), South Region Conference, Greensboro NC, Proceedings of the 2006 South Regional Conference of the Interior Design Educators Council
- 2005 **Wachter, H.P.** (November 2005) "*Student experience in an*

online interior design studio” Poster presentation, Interior Design Educator Council (IDEC), South West Conference, Norman OK, proceedings of the 2005 South West Regional Conference of the Interior Design Educators Council

Invited Conference Speaker

- 2015 Program for Professional Development, “Positive Aging and Environmental Design”, The University of Oklahoma, Anne and Henry Zarrow School of Social Work
- 2015 Arts and Social Practice Symposium, The University of Oklahoma, Anne and Henry Zarrow School of Social Work, March 7th,
- 2014 Community Health and Environmental Design Public Forum on School Shelters. Panelist, May 2nd University of Oklahoma Schusterman Center, Tulsa OK
- 2012 “Creating Safe Environments: Person-Environment Interface”
Panelist, Geriatric Translational Research Institute, Oklahoma City, OK
- 2011 “*China toward improved Healthcare*” Panelist, Health Industry Advisory Council, Texas A&M University, College Station Tx
- 2011 Southeast University, Nanjing China. College of Architecture “*Current Trends in Healthcare Design; An Interior Designs Perspective*”
Architecture for Health Lecture Series, Speaker.
- 2010 National Association of the Social Workers. Annual Social Work Day “*Collaboration for Environmental Design and Community Development in Positive Aging*” Panelist, October 22, National Weather Center, Norman OK
- 2010 Architecture + Construction Alliance, VA Tech - WAAC Facility, Speaker, Alexandria, Virginia, November 9th, 2010
- 2010 Designing Futures: The Interiors Entity. Regional Think Tank, International Federation of Interior Architects/ Designers, Texas Christian University Forth Worth, Texas, August 9th 2010

Grants, Research Support, Honors and Awards

- 2018 Promotion, Professor, University of North Texas
- 2016 “A Measure for Assessing Situations Awareness of Fall Risk in Community Dwelling Older Adults” D.W. Reynolds

- Foundation, Interdisciplinary Seed Grant Program SFAR, Azzarello J, (PI), Hall B., Buckner S., **Wachter H.P.**, Sorocco K., Hamm R., Teasdale T., (Co-Investigators) \$30,000.00
- 2015 Best Paper Presentation, Interior Design Educator Council Annual North American meeting and conference, SW Region, Fort Collins, CO
- 2014 "Sustainability, Clean Air & Safety in School Design", EPA 83563401
Holiday L.,(PI), **Wachter H.P.**, Keesee, M., (Leadership) \$984,174.00
- 2014 American Society of Interior Designer, Oklahoma Chapter, *"Excellence in Design Competition, 1st Place Small Commercial Space*
- 2014 American Society of Interior Designer, Oklahoma Chapter, *"Excellence in Design Competition, 1st Place Interior Object, Furniture*
- 2014 Presidential International Travel Fellowship Award, University of Oklahoma
- 2013 Research Seed Grant, *"Effect of IEQ on Perceived Health Symptom of Occupant Based on Age"* Bhattacharjee S., **Wachter H.P.**, (Leadership Team 50%) University of Oklahoma \$3,500.00
- 2012 University of Oklahoma, Big 12 Fellowship Award, *"Healthcare Certification Study"*
- 2012 College of Architecture, University of Oklahoma *"Excellence in Teaching"* Award
- 2012 Nominated by the Division of Interior Design to IIDA *"IIDA Educator of the Year"*
- 2011 College of Architecture, University of Oklahoma *"Excellence in Research"* Award
- 2011 Nominated by the Division of Interior Design to *"IDEC Teaching Excellence Award"*
- 2011 International Interior Design Association, Texas/Oklahoma Chapter, LEED Exam reimbursement Grant
- 2011 International Interior Design Association, Texas/Oklahoma Chapter, Student Conference Travel Grant, \$1,750.00
- 2010 American Society of Interior Designer, Oklahoma Chapter, *"Excellence in Design Award, Lounge"*
- 2010 American Society of Interior Designer, Oklahoma Chapter, *"Excellence in Design Competition, 1st Place Contract-Hospitality/Institutional Lounge"*

- 2010 American Society of Interior Designer, Oklahoma Chapter, *"Excellence in Design Competition, 2nd Place Product, Furniture, Design Detail, Invisible Design Exhibit"*
- 2010 Tenure and Promotion Associate Professor, The University of Oklahoma
- 2010 *Excellence in Forum and Education Activities*, Honorable Mention
International Interior Design Association, Texas-Oklahoma Chapter, Vice President of Forums 2007- present, <http://www.iida.org/content.cfm/2010-iida-chapter-award-winners>
- 2010 *Large Chapter of the Year*, International Interior Design Association, Texas-Oklahoma Chapter, *Board* member 2005 - 2012
<http://www.iida.org/content.cfm/2010-iida-chapter-award-winners>
- 2010 *"Photo Voice Exhibition: Norman Aging Needs Assessment Project"* Norman Arts Council Hotel Tax Grant Program, \$1,850.00
- 2010 NIH, INBRE Administrative Supplement Grant Project in Community Health Research, \$15,000.00
"Taking it to the Street: Community Health and Economic Development"
- 2010 OU Vice President of Research Faculty Travel Assistance Grant, \$785.00
- 2010 International Interior Design Association, Texas/Oklahoma Chapter Student Conference Grant, \$770
- 2009 Faculty Fellowship Program of the Big 12 Universities, \$2,500.00
- 2009 University of Oklahoma, Office of the Vice President for Research. Small grant program, \$700.00 "Design is Invisible" exhibit; Dreamer Concept Gallery, Norman OK
- 2009 Schroeder Low-Energy-House LTC., Research grant \$30,000.00
- 2009 International Interior Design Association, Texas/Oklahoma Chapter Student Conference Grant, \$1,000.00
- 2009 Nominee, College of Architecture Outstanding Teaching Award
- 2009 Nominee, College of Architecture Outstanding Service Award
- 2008 Price Tower Foundation, Architecture Research Center

- Fellowship, Bartlesville OK, in-kind travel stipend, accommodation and staff assistance.
- 2008 Oklahoma Scholar Leadership in Education Program, recipient
- 2008 Faculty Senate, Faculty Development Grant, \$2,500.00 "*Color Teaching*" course development and travel assistance
- 2008 Presidential Dream Course Grant, **Wachter H.P**, Boeck D., McCuen T., "*Integrated Practice: Specializing in Healthcare*", \$20,000.00
- 2008 International Interior Design Association, Texas/Oklahoma Chapter Student Conference Grant, \$1,000.00
- 2008 Nominee, University of Oklahoma, Presidents office for the 2009 Japan Studies Fellowship
- 2007 Ed Cline Faculty Development Award, University of Oklahoma "*Color Teaching*"
- 2007 Undergraduate Research Opportunity Program (UROP) Sponsor of Patrick Andrews "*Alzheimer Facility Research: Way finding*"
- 2007 OU Presidential Dream Course Award (with Dave Boeck, Tammy McCuen) "*Specializing in Healthcare*"
- 2007 Outstanding Faculty Member Award, presented by the University of Oklahoma Fraternity and Sorority Student Life
- 2007 International Interior Design Association, Texas/Oklahoma Chapter, Student Conference Grant, \$3,000
- 2007 The Kerr Fund Interior Design Library Grant, (with Scott Williams), \$1,500
- 2006 Membership Grant, IIDA Texas/Oklahoma Chapter \$480
- 2006 Undergraduate Research opportunities Program (UROP) Sponsor of Eric Gonzales "*Design Process*"
- 2006 W. Edwin Bryan Professor of Architecture Research Grant \$1,000 "*Teaching online design studio*"
- 2006 International Interior Design Association, OKC/Tulsa City Center, Student Days Travel Grant, \$1,000
- 2006 Travel Grant, Scottsdale AZ, Interior Design Educator Council (IDEC) national conference, \$1,750
- 2005 Undergraduate Research Opportunity Program (UROP)\ Sponsor of Alison Armstrong "*Assisting Alzheimer Patients through Color Coding in Interior Environments*"
- 2005 Outstanding Faculty Award, presented by PHI KAPPA PHI

- Honors Society
- 2005 Membership Grant, IIDA Texas/Oklahoma Chapter \$480
 - 2005 LEED Technical Review Workshop grant, \$500 (endowment funds, J. Kudrna)
 - 2005 W. Edwin Bryan Professor of Architecture Research grant \$1,000
 - 2005 Travel Grant, Savanna GA, Interior Design Educator Council (IDEC) national conference, \$1750
 - 2004 Research Dissemination Grant, Savanna GA, Furniture Society Conference, \$980
 - 2004 Research Dissemination Grant, Chicago IL, National American Architecture Association (AIA) Convention \$1,200

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