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CHAPTER I

STATEMENT OF PROBLEM AND PURPOSE OF STUDY

The general problem examined through this study was the educational needs of older Americans. The research was exploratory and was designed to identify possible programming implications for institutions of higher education. The starting point for the research was an examination of the impact of growing numbers, proportion and reported needs of older people in the nation's population. Using this as a foundation for establishing the importance of the problem, the study employed a selected group of senior learners who were currently attending The University of Oklahoma as a data source for examining the educational needs of senior learners. The primary questions examined in this study were:

1. What educationally relevant characteristics do these selected senior learners possess?

2. What are the perceived educational needs of selected senior learners?

3. What institutional and personal barriers limit or constrain the use of the university for selected senior learners?

4. Based upon the perceptions of selected senior learners, what differences, if any, exist between the institutional roles which the university fulfills for the general population and the role required by senior learners?

Background and Need for Study

A fundamental structural change has occurred in the population of the United States. America and Americans have aged. Accompanying this fact have been some important and probably fundamental social changes, changes which affect the nation's basic social structure. The magnitude and importance of these changes become clear when population changes, the media attention to the "Graying of America" and recent legislative enactments pertaining to older Americans are examined.

Historically, despite early adult education activities, the nation's educational system was strongly oriented to needs of the young. With a rapidly increased population, the importance of education was reflected in rising financial support levels and in the variety and forms of educational programs to serve children, youth and young adults. But more recent declines in birth rates and declining sizes of age cohorts of young persons have already affected elementary and secondary institutions. Schools have

closed or consolidated and the once pressing need for teachers has been reduced or no longer exists in many communities.

College and university enrollments continued to grow until recently. Already some higher education institutions' enrollments have leveled off and in some instances have declined. Based upon enrollment projections, this trend will intensify and related fiscal and other problems can be expected to emerge. As an example, in 1960 total enrollments for institutions of higher education numbered 3,789,000. By 1970, this figure had more than doubled to 8,581,000. Enrollments are expected to increase at a slower rate until 1983 when an actual decline in enrollment is projected. For four year institutions, the reversal in enrollment trends is expected in 1981.[1]

While the nation's educational commitment to youth continues, there is mounting evidence that older segments of the population have shown an interest in and have made increased use of the university.[2] Faced with declining enrollments, university administrators and program planners will examine the university's role and the needs of various population groups, especially older Americans.

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[1]National Center for Educational Statistics, The Condition of Education: 1977, Vol. 3, Part 1, (Washington, D.C.: Government Printing Office, 1977), pp. 348 and 177.

[2]Ibid., pp. 83 and 179.

People are a democratic nation's most important resource. Formal education has been the primary means employed to transmit needed knowledge, skills and values to maximize people's contributions. In an increasingly complex and rapidly changing society, attention to development and regeneration of this resource will assume greater importance.

The nation's older members have not always been regarded as a resource. Quite the contrary. However, there are beginning indications that this position is changing. In this connection Davis noted:

> The development, conservation, and use of the potentials of the older members of our population should be one of the major concerns of society. Since education is one of the most significant means of achieving this purpose, it is important to consider the educational implications inherent in the problems and opportunities.[1]

From a perspective of utility and concern for human potential, this study focused on the educational needs of the nation's older citizens.

Demographic Trends

This nation has prospered in its first two hundred years. One measure of prosperity has been a phenomenal growth in population. In 1776, the nation's total population numbered about 2.5 million or just over one percent of the nation's population in 1976. There were relatively few older citizens at the time of our nation's beginning; about

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[1]George E. Davis, "Education for Aging," Adult Leadership, May, 1960: 2 and 25.

two persons out of one hundred were aged sixty-five or older (50,000 persons). It was a difficult and dangerous life. At birth, the American of two-hundred years ago had a life expectancy of about thirty-eight or thirty-nine years.[1]

In 1976, approximately one in every ten persons (22.9 million people) in the United States was aged sixty-five or over. At 1976 death rates, the older population is projected to increase 40 percent to 31.8 million by the year 2000.[2] A jump in the percentage of persons over age sixty-five will come between the years 2010 and 2020 when those born during the post World War II decade become age sixty-five. At this time, an estimated one out of seven persons will be over age sixty-five, and by 2030 the proportion will be one out of six.[3]

The State of Oklahoma has reflected much of this change. According to the U.S. Department of Health, Education and Welfare's Administration on Aging, in 1976, eight states had an unusually high proportion of older persons

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[1]U.S., Department of Health, Education and Welfare, Office of Human Development, Administration on Aging. Facts About Older Americans, 1976, Publ. No. (OHD) 77-20006.

[2]U.S. Department of Commerce, Bureau of the Census, Population Estimates and Projections, Series P-25, No. 704 (July 1977), p. 10.

[3]U.S., Department of Commerce, Bureau of the Census, Demographic Aspects of Aging and the Older Population in the U.S., Special Studies Series P-23, No. 59 (May 1976), p. 3.

(12 percent or more) in their total populations. Oklahoma was eighth with 12.3 percent or 334,000 older Americans. This represents an 11.8 percent increase between 1970 and 1975.[1]

The increasing number and proportion of older people in the population has not only been affected by changing birth rates but also by a variety of medical, technical, economic and related societal changes. Americans now live longer. A reflection of these advancements has been evident in the changing average life expectancy for Americans at birth. For example, in 1920 the life expectancy for men and women was 54.1 years (male 53.6 and female 54.6). By 1950 this had grown to 68.2 years (male 65.6 and female 71.1) and for 1974 it was 71.9 years (male 68.2 and female 75.9).[2] Also, there has been a growing life expectancy spread between men and women. As an example, by the year 2050 the projected difference in life expectancies for males and females will be close to 10 years (males 71.8 and females 81.0).[3]

Perhaps changes in the median age of our population represent the clearest way of demonstrating the aging of the nation's population. Table I reports a reversal of a trend

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[1]U.S., Department of Health, Education and Welfare, Office of Human Development, Administration on Aging, Facts about Older Americans, 1976.

[2]U.S., Department of Commerce, Bureau of the Census, Statistical Abstracts of the United States, 1976, p. 60.

[3]U.S., Department of Commerce, Bureau of the Census, Population Estimates and Projections, p. 1.

from a younger to an older population which occurred in 1970 (27.9 years).[1] A steady increase in the median age started in 1972 (28.1--not shown) with an uninterrupted increase projected to 35.5 years for the year 2000. It should be noted that the Bureau of Census provides three series of estimates of median age based on different fertility assumptions. Table I was derived from Series II, the middle set of fertility assumptions.

TABLE I

ESTIMATES AND PROJECTIONS OF THE MEDIAN AGE OF THE POPULATION FOR SELECTED YEARS: 1950-2000

Year	Median Age
1950	30.2
1960	29.4
1970	27.9
1980	30.2
1990	32.8
2000	35.5

Source: U.S., Department of Commerce, Bureau of the Census, Statistical Abstracts of the United States, 1976, p. 60.

A number of demographic aspects of the nation's older population were interesting, but particularly pertinent to this study were changes in educational attainment levels.

[1] Ibid., p. 10.

Educational attainment of older persons was well below that of the adult population in general. For example, in March, 1975, the percentage of persons aged sixty-five and older who had graduated from high school was only about three-fifths as great as for the entire population twenty-five years and over. Citing this gap, a Census Bureau report on the older American observed:

> The negative relationship between age and educational attainment reflects the widening opportunity available to each new cohort of students and the increasing aspiration for, and achievement of, greater education on the part of the new cohorts. These factors have been associated with the rising socioeconomic status of the United States' population and the concomitant intergenerational influences. Another factor has been the special history of immigration to the United States, which now accounts for a much larger proportion of foreign-born persons among the older population than at the younger ages.[1]

Table II provides detailed information on educational attainment levels for selected age groups by sex between 1952 and 1990.[2] Differences between educational attainment of men and women have implications for institutions of higher education. As evidenced in Table II, women have had higher educational attainment levels than men. Similarly, and as noted earlier, women tend to live longer than men. For example, in 1975, women age fifty-five and over represented 21.6 percent of the total population of women in the United

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[1]U.S., Department of Commerce, Bureau of the Census, Demographic Aspects of Aging and the Older Population in the U.S., p. 49.

[2]Ibid., p. 50.

TABLE II

EDUCATIONAL ATTAINMENT OF THE POPULATION 65 YEARS OLD AND OVER AND 25 YEARS OLD AND OVER, BY SEX: 1952 to 1990

Sex and year	Median school years completed			Percent high school graduates		
	65 years old and over	25 years old and over	Ratio, 65 and over to 25 and over	65 years old and over	25 years old and over	Ratio, 65 and over to 25 and over
Both Sexes						
1952	8.2	10.1	0.81	18.4	38.4	0.48
1959	8.3	11.0	0.75	19.4	42.9	0.45
1965	8.5	11.8	0.72	23.5	49.0	0.48
1970	8.7	12.2	0.71	28.3	55.2	0.51
1975	9.0	12.3	0.73	35.2	62.6	0.56
1980	9.7	12.4	0.78	37.9	65.4	0.58
1985	10.9	12.5	0.87	44.0	70.2	0.63
1990	11.9	12.6	0.94	49.4	74.2	0.67
Male						
1952	8.0	9.7	0.82	15.3	36.4	0.42
1959	8.2	10.7	0.77	18.1	41.3	0.44
1965	8.3	11.7	0.71	21.8	48.0	0.45
1970	8.6	12.2	0.70	25.9	55.0	0.47
1975	8.9	12.4	0.72	33.4	63.1	0.53
1980	9.4	12.5	0.75	36.3	66.5	0.55
1985	10.7	12.6	0.85	43.0	71.9	0.60
1990	11.8	12.7	0.93	48.7	76.3	0.64
Female						
1952	8.3	10.4	0.80	21.1	40.2	0.52
1959	8.4	11.2	0.75	20.4	44.4	0.45
1965	8.6	12.0	0.72	24.7	49.9	0.49
1970	8.8	12.1	0.73	30.1	55.4	0.54
1975	9.4	12.3	0.76	36.5	62.1	0.59
1980	9.9	12.4	0.80	38.9	64.4	0.60
1985	11.1	12.4	0.90	44.7	68.7	0.65
1990	12.0	12.5	0.96	49.9	72.3	0.69

States. Men age fifty-five and over represented 17.8 percent of the total men in the population.[1]

Images of Older Americans

The basic structural changes occurring in the nation's population have been reflected by the media. The consequences of aging in America have received much attention in newspapers, magazines, radio and television. One of the more recent popular treatments of the subject was a special report by Mayer and others in Newsweek, "The Graying of America." In the report, Mayer confronted some of the stereotypes regarding older Americans:

> Most interesting, in fact, is what old people are not. Contrary to popular belief, only 5 percent of the 23 million Americans over 65 are confined to nursing homes and institutions, and only 10 percent more, experts say, ought to be. Most senior citizens do not move to Florida or anywhere else for that matter: only 5 percent of the population pulls up stakes after retirement. Over half of America's elderly live with their spouse in independent households, usually in communities where they have roots; one-fourth live alone and only 15 percent live with their children.[2]

And according to Mayer, most older Americans were not poor and neglected. He cited that older citizens reported a 1976 family median family income of $4,800 (compared to $12,400 for families between the age of 18 and 64). But this did not include interest from savings, income from "bootleg" jobs, nor supplementary income from children or

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[1] Ibid., p. 8 (Table 2.4).

[2] Allan J. Mayer, "The Graying of America," Newsweek 89 (February 28, 1977): 50-52.

other sources. Older Americans living below the poverty level were 25 percent in 1969, and had dropped to 16 percent in 1974.

Magazine, television, movies, and newspaper treatments of the older American did not go unnoticed by professionals in the field of aging and by researchers. Bernice L. Neugarten examined the media's attention to the older population in "Patterns of Aging: Past, Present, and Future."

> The image of the old man in the rocking chair is now matched by the white-haired man on the golf course. Even television images are beginning to change. "Maude" is a forceful, liberal, middle-aged woman. "A Touch of Grace" portrays an elderly widow being courted by an elderly man, with both persons portrayed sympathetically. "Sanford and Son" are a black man and his adult son who have a close and mutually supportive relationship in which the older father emerges as the wiser and more astute.[1]

She further related changing attitudes regarding older persons as depicted through newspaper reports. In 1967, five members of the House of Representatives introduced resolutions calling for an investigation by the House Judiciary Committee into the moral character of Supreme Court Justice William O. Douglas. The requested investigation seemed to be precipitated by "venomous" newspaper comments regarding his marriage to a twenty-three year old coed. This was in contrast to a 1973 newspaper report of

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[1]Bernice L. Neugarten, "Patterns of Aging: Past, Present and Future," Social Service Review 47 (December 1973): 574.

Strom Thurmond, the sixty-nine year old senator from South Carolina. The caption under a photograph of Senator Thurmond, his young wife, eighteen-month old daughter, and newborn son read, "Happy Pappy."

Relationships between images or stereotypes held by society and behaviors of older people have been reported by Robert N. Butler, Director, National Institute on Aging. He conducted research in which the association of stereotypes about age and behavior was investigated. Rorschach tests were administered to two groups as a means of comparing responses and behavior patterns. The two groups were older people and American servicemen who had been captured in the Korean War. Butler's findings were summarized in an interview reported in U.S. News and World Report, noting:

> It turned out that those older people who accepted all the stereotypes about age--that you're washed up, you're senile, you're not able to be physically active--reacted to the test in the same way as those prisoners who had collaborated with the Communists. Those older people who disagreed with what society expected from the aged followed the pattern shown by the prisoners who resisted collaboration.[1]

The relationships between societal expectations and behaviors of the adult learner were of special concern to the 1971 White House Conference on Aging. Howard T. McClusky,

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[1]Robert N. Butler, "How to Have a Longer Life and Enjoy It More: Interviews with Dr. Robert N. Butler, Director, National Institute on Aging," U.S. News and World Report, 12 July 1976. Also available as a reprint through the National Institute on Aging, National Institutes of Health, Editorial Operations Branch, Bethesda, Maryland 20014.

now associated with the Institute of Gerontology of the University of Michigan-Wayne State University, served as chairman of the Technical Committee on Education for the Conference. In a pre-conference paper, McClusky observed that in our society a major task and expectation for children and youth has been to attend school and learn. This learning was to prepare youths for the tasks and responsibilities of adulthood. In contrast, adulthood was the time for working. The prevailing message has been that learning is for children and youth. He submitted that this lack of being socialized into the concept and value of lifelong learning posed particular problems for adult learners. In this connection, McClusky noted:

> The dominant thrust of society's expectations and equally of his self expectations is that for an adult the learning role is not a major element in his repertoire of living. Thus, both society and the adult view himself as a non-learner. Our theory is that this failure to internalize the learner role as a central feature of the self is a substantial restraint in the adult's realization of his learning potential.[1]

McClusky discussed the importance of development of societal support for the notion that continued study, learning and an intellectual adventure are an important and necessary part of adult life. His point is particularly relevant to the older adult associated with previously mentioned stereotypes.

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[1]Howard Y. McClusky, "An Approach to a Differential Psychology of the Adult Potential," University of Michigan, 1970. (Mimeographed), p. 90.

Legislative Activity

A review of national level legislative activity directed specifically at the interests and concerns of older citizens provides a means of viewing the political importance of the trend toward an enlarging older population group. The relative importance of education as a response to the needs of this population segment can also be ascertained by examining legislative action. Legislative enactments represent public policy declarations and commitments.

Passage of the Older Americans Act of 1965 (PL 89-73) was a most significant legislative enactment affecting the nation's older citizens. The Act set forth a series of national goals pertaining to older citizens and established the Office of Aging as an administrative mechanism to coordinate work toward the goals. Citing the importance of this Act to institutions of higher education, Vasey observed:

> It is a fact that the Older Americans Act for the first time enunciated a national policy on aging, and identified the aged as a special constituency for public service. In this Act, in its original Title IV and V, provision was made for support of education, training and research as a national policy, and included provision for federal funding for programs in the various institutions of higher education.[1]

There were a number of provisions in the Older Americans Act of interest to those researchers in the area of

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[1]Wayne Vasey, "What Should Degree Programs in Gerontology Contain?", a paper presented at Region V Symposium on Continuing Education in Gerontology, Institute of Gerontology, University of Michigan, Ann Arbor, Michigan, 6-9 February 1975.

aging. As an example, Title II of the Act authorized the new agency to serve as a clearinghouse for information related to problems of the aged and aging. Establishment of this function helped to increase and focus the flow of information regarding older citizens. Title III of the Older Americans Act was important in that it not only provided money to support projects to serve the older population at community levels, but also established a network of local (areawide) planning and coordinating agencies. These local planning agencies helped to develop a nationwide infrastructure dedicated to the interests of America's older citizens.

Responses of the federal government to educational needs of older Americans were of primary interest to this study and several additional pieces of national legislation related to this special interest. The first was enactment of Title I of the Higher Education Act of 1965 (PL 891-329 as amended). This title authorized grants to the states to strengthen community programs of colleges and universities for purposes of assisting in dealing with community problems through provision of continuing education programs for adults. The legislation also provided money for special projects to deal with problems brought about by technological change.

Another major piece of legislation was the Adult Education Act of 1966 (PL 89-750, Title III as amended) which provided for undereducated adults to continue their

education to at least the level of completion of secondary school. In view of educational attainment levels of older Americans, this legislation has special importance. A Senate report on older Americans prepared by the Administration on Aging noted:

> The adult performance level study also confirms that many older persons have a critical need for acquiring functional competences and life coping skills. Of those persons who ranked in the lowest APL competency level, the study's finding show the largest percentage of persons in the age group of 50-59.
>
> In response to this need, it is recommended that special consideration be given to assessing the educational needs of older citizens, to designing delivery systems for counseling and instruction, to developing curricula to provide competency-based adult education for older citizens or to evaluating the effectiveness and impact of programs for the elderly.[1]

But legislative enactments which provided support for educational programs for undereducated adults have not secured immediate results in terms of participation. For example, in 1975 there was an inverse relationship between age and participation in adult education programs. Those age sixty-five and over had an estimated 34,107 persons (5.9 percent) participating in such programs; those age twenty-five to sixty-four had 50,407 (8.8 percent); while those between sixteen and twenty-four had 492,615 (85.3 percent).[2]

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[1]U.S. Congress, Senate, Part 2 - Appendixes--Developments in Aging: 1976, S. Rept. 95-88, 95th Cong., 1st sess., p. 136.

[2]Ibid.

A legislative enactment especially pertinent to this study was The Lifetime Learning Act (S-541-42) whose principal author was Senator Walter Mondale. The legislation was passed on December 18, 1975, and was an amendment to the Higher Education Act of 1965. The Carter Administration requested an appropriation of five million dollars in FY 1979 to implement it, but it was not funded. The importance of this legislation to older Americans was highlighted by John B. Martin, legislative consultant for the American Association of Retired Persons-National Retired Teachers Association and former U.S. Commissioner on Aging. In Senate testimony on December 18, 1975, Martin remarked:

> Lifetime learning is a "two way" street benefiting both the learner and the teacher. Older persons represent an invaluable resource in our society and offer many years of life and employment experience. They not only can be the recipients of a Lifetime Learning Act, but their wealth of experience also can be utilized in helping others to learn. Older persons should be considered a resource as we look to extended lifelong learning opportunities.[1]

Additional federal level interest was evidenced. In 1971, a White House Conference on Aging was convened. The preamble to the report clearly stated that one of the Conference's concerns was that:

> Education is a basic right for all persons of all age groups. It is continuous and henceforth one of the ways of enabling older people to have a full and meaningful

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[1]U.S., Congress, Senate, Part 1 - Developments in Aging: 1976, S. Rept. 95-88, 95th Cong., 1st sess., p. 171.

> life, and a means of helping them develop their potential as a resource for the betterment of society.[1]

The resulting twenty-three recommendations addressed several major issues: allocation of financial and manpower resources for education and aging; populations among the aging who should receive special attention; types of services to be developed; and ways to provide these services effectively. Of these, three recommendations have special importance for the present study, VI, XI, and XIII:

> Recommendation VI
> For older persons to participate in educational programs, agencies, organizations, and government must provide incentives. These incentives should be aimed at eliminating specific barriers to the availability and accessibility of educational services for older persons including transportation, free attendance, subsistence, auditing privileges, relaxed admission requirements, flexible hours, convenient locations, subsidies to sponsors, and removal of legal barriers.[2]

Recommendation XI discussed educational needs for more successful adjustment to aging, needs for better use of services and cultural enrichment.[3] Recommendation XIII spoke directly to assessing the educational needs of older Americans as follows:

> Available facilities, manpower and funds must be used for educational programs designed and offered on the basis of the assessed needs and interests of older persons. The initiative may be taken by many sources,

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[1]U.S., Department of Health, Education and Welfare, 1971, White House Conference on Aging, Section Recommendations on Education. (Washington, D.C.: Government Printing Office, 1972), p. 1.

[2]Ibid., p. 3.

[3]Ibid., p. 4.

> but the design and curriculum must include active participation by older persons.[1]

The focus of the White House Conference's recommendations assumes education to be a continuous process intended to help individuals maximize their potential. Educational institutions should work to remove barriers to the availability and accessibility of educational services. These services should be designed based upon the assessed educational needs and interests of older persons and this assessment should include participation of the target population. The present study systematically sought to encapsulate these recommendations and concerns. Three major classifications of inquiry pursued in this study represent the Conference's recommendations: perceived educational needs of a target population of senior learners, barriers to utilization and institutional roles of universities in the continuous learning process.

Summary

This chapter was directed at establishing the suitability and importance of this area of inquiry for those persons interested in higher education administration and programming for older adults. Demographic information was presented to demonstrate how "undereducated" the older person in this society is in relationship to other age groupings. In addition to reviewing structural changes in the nation's

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[1]Ibid.

population, myths or stereotypes of older Americans were examined in relationship to the purposes of this study. The media's contributions to the changing image of the older person illustrated that with changes in the general public's notions of older citizens, changes in institutional responses may be expected. Legislative activity has increasingly reflected the concerns of this population group. The executive branch of the government's response to this population can most clearly be seen in the 1971 White House Conference on Aging where specific recommendations regarding the educational needs of older citizens were addressed.

It is expected that this study will contribute to an understanding of older Americans and the university's role in meeting their needs through educational programming. Further, it is expected that this research will offer support and programmatic direction for learning opportunities for older Americans through colleges and universities.

CHAPTER II

REVIEW OF RELATED LITERATURE

This chapter reports literature which assists in the study of educational needs of senior people and the role of the university in meeting those needs. The information in this chapter has been organized to include the following units: Who is the older American?, older Americans and participation, education and the aging, senior learners and the university, need theory, and need assessment research. These background materials provide a basis for aspects of methodology employed in the study.

Who is the Older American?

One of the several difficulties in approaching a study of educational needs of older adults was operationally defining the age groups. Depending on purpose, the age of fifty-five, sixty, sixty-five, seventy or some other such age has been used to identify the beginning of the older group. Currently, the most commonly used age for such a designation is sixty-five. The use of sixty-five as the transition year into "old age" has been tied most clearly to retirement and assistance provisions in the Social

Security Act (Title 42 U.S.C.A., Section 301-1399). Discussing the questions, "How old is old? Who are the aged? Why sixty-five?" Fink et al. reported:

> Whether one is old at 65 years of age does not seem to be so important as the unthinking and unthoughtout prescription that workers should retire at 65, that eligibility for old-age assistance begins at 65, and that old-age benefits under our federal social insurance program may be obtainable at 65 years. In this connection it may be pertinent to recall the pressures during the Depression of the 1930's for older workers to make room in the labor market for younger workers.[1]

It should be remembered that the Social Security Act became operative on August 14, 1935, and age sixty-five was the standard for its assistance and insurance provisions. HR 5383, which amends the Age Discrimination in Employment Act of 1967, raised the mandatory retirement age from sixty-five to seventy beginning January 1, 1979, and provided still another definition of the older adult, i.e., that older age and retirement are determined by the individual.

A thorough search of the literature provided no theoretical basis for sixty-five or any other such age as representing a compelling point for considering the start of "old age." Havighurst offered a general approach to the problem of definition instead of an age specific definition. He argued the need for a theory pertaining to successful aging and contrasted disengagement and activity theories. He observed:

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[1]Arthur E. Fink, Everett E. Wilson, and Merril B. Conover, The Field of Social Work, 4th ed., (New York: Hold, Rinehart and Winston, Inc., 1963), p. 405.

> The activity theory states that successful aging means the maintenance, as far and as long as possible, of the activities and attitudes of middle age. The disengagement theory defines successful aging as the acceptance of a desire for disengagement from active life.
>
> The activity theory is favored by most of the practical workers in gerontology.[1]

Building on the basic notions of activity theory, Neugarten developed a definition of the older American. She has distinguished between the young-old (age fifty-five to seventy-five) and the old-old (over age seventy-five). In connection with the young-old, she observed:

> . . . stereotypes of old age are now changing with rise of the young-old--that is, the age group 55 to 75, who constitute 15% of the population--who are relatively healthy, relatively affluent, relatively free from traditional responsibilities of work and family and who are increasingly well educated and politically active. This group will develop a variety of new needs with regard to meaningful use of time and for maximizing the opportunities for both self enhancement and community participation.[2]

In a later article Neugarten further related that factors such as life styles, family data and health status suggest that the young-old as a total group were more like younger than older-age groups. She concluded:

> We are already seeing a trend which will probably accelerate a wider range of life patterns with regard to work, education, and leisure. More middle-aged and

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[1]Robert J. Havighurst, "Successful Aging," Processes of Aging, Vol. 1, ed. Richard Williams et al., (New York: Atherton Press, 1963), pp. 308-9.

[2]Bernice L. Neugarten, "Age Groups in American Society and the Rise of the Young-Old," Annals of the American Academy of Political and Social Sciences, 415 (September 1974): 187-98.

> older people are seeking education, some because of obsolescence of work skills, others for recreation or self fulfillment.[1]

Boyd Rogan, Director of Community Education at the University of Alabama discussed this age group and a concern for responses to their needs by the educational establishment. At a Conference on Aging he commented:

> Of all citizens of our nation, the educational needs of the adult population fifty-five years and older have been more neglected than any other age group. This neglect is neither the result of lack of interest on the part of the subject population or knowledge about the elderly, nor the intent of educational institutions or their fundamental unwillingness to serve the elderly. The inability to relate human needs to educational resources is the primary cause of this neglect.[2]

Older Americans and Participation

An initial question suggested in the problem with which this study deals is whether there is a basis for participation of older adults in programs associated with personal growth. Much of the literature in the field of aging treats growing old as a problem rather than as a normal developmental stage.

Riley has summarized much of the literature that equates growing old with "problem."[3] A general tone of

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[1]Bernice L. Neugarten, "The Future and the Young-Old," The Gerontologist, 15, No. 1, Part II (February 1975): 4-9.

[2]Boyd Rogan, Conference on Aging, Social Perspectives, IV, No. 1 (December 1976): 11.

[3]Matilda White Riley, "Work in Progress on Aging and Society," Sociological Inquiry 39, No. 1 (Winter, 1969): 106-7.

pessimism was also evident in the search for theories of successful aging. Havighurst and Neugarten examined such theories, giving particular attention to theories of disengagement and activity.[1]

The implications of disengagement theory are of concern to social scientists when viewed in terms of the gloomy outcomes of what constitutes success in aging. This theory holds that older individuals "successfully" disengage from people and activities which previously characterized the years preceding entry into "old age." These attachments and associated energies are transferred to an "inner life." This disengagement process offers an explanation of the older person's preoccupation with earlier life and previous accomplishments. Fantasies which in some instances become associated with earlier experiences may in part be explained by such a theoretical perspective. Certainly, disengagement or the process that it depicts may take place during the course of aging. This particular theory considers that the disengagement action is initiated by the individual who is growing older and that it is a natural biological and psychological process. In essence this was the position set forth by Cumming, Dean, Newell and MacCaffrey.[2] It can

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[1]Havighurst, Processes in Aging; and Bernice L. Neugarten, Middle Age and Aging (Chicago: The University of Chicago Press, 1968).

[2]Elaine Cumming, Lois Dean, D. S. Newell and Isabel MacCaffrey, "Disengagement--A Tentative Theory of Aging," Sociometry 23 (1960): 23-35.

be argued, as do adherents of activity theory and as noted by Havighurst,[1] that disengagement might just as easily be seen as initiated by society, for example, through forced retirement and retirement "villages."

Havighurst argued that aging is a natural process with special opportunities for continued personal growth. Although activity theory is in an early state of development, it represents a growth viewpoint from which aspects of aging can be examined.

The present study focused on the developmental or continuance process in engagement, not the disengagement process among older people. Recent popular writings such as Sheehy's Passages: Predictable Crises of Adult Life, Levinson's The Seasons of Man's Life, and Gross' The Lifelong Learner have reflected an emerging focus on continuance and growth processes.[2] Each of these authors used eras, developmental stages or "underlying rhythm" to describe life processes or cycles. Gross dealt most specifically with education and learning. One of his primary points was that, "most of us prefer to learn with other people, if not necessarily from them."[3] In his discussion of the "free learner,"

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[1]Havighurst, "Successful Aging," p. 309.

[2]Gail Sheehy, Passages: Predictable Crises of Adult Life (New York: E. P. Dutton, 1974); Daniel J. Levinson, The Seasons of Man's Life (New York: Alfred A. Knopf, 1978); and Ronald Gross, The Lifelong Learner (New York: Simon and Schuster, 1977).

[3]Gross, p. 21.

he noted that such a learner is no longer at odds with the nation's colleges and universities because of recent special accommodations. These authors used a growth viewpoint of aging and assumed that continual renewal is a natural process.

In the present study, education was considered to be related to need satisfaction activities associated with all normal growth and development processes. By contrast, disengagement theory seemed to offer little basis for programming to meet the needs of senior learners. The humanistic psychology of Abraham H. Maslow is growth-oriented. While critical of much current educational programming, Maslow discussed integrating the role of education in the process of human and societal development. With respect to the function of education he noted:

> . . . the goal of education, the human goal, the humanistic goal, the goal so far as human beings are concerned--is ultimately the "self-actualization" of a person, the becoming fully human, the development of the fullest height that the human species can stand up to or that the particular individual can come to.[1]

Maslow developed the proposition that there are innate sources of motivation which he called needs.[2] He also distinguished between his concept of needs and the notion of wants (preferences, desires, and wishes). In the case of the latter, the sources of wants are learned responses and have their roots in environmental (external) sources.

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[1]A. H. Maslow, The Farther Reaches of Human Nature (New York: Viking Press, Inc., 1971), pp. 168-9.

[2]A. H. Maslow, "A Theory of Human Behavior," Psychological Review 50 (July, 1943): 370-96.

This distinction has significance for the present research and suggests there may be a much deeper source of motivation for continued learning for older adults than just a preferred or alternative way of spending leisure time.

Education and the Aging

Because of the evolving and developmental nature of activity theory, two additional areas of literature were examined with regard to continuance or activity of older persons in relation to education. The first area investigated was the increasing attention being given to educational needs and opportunities for older Americans and the second was learning abilities of senior learners.

A significant amount of writing and a growing body of research are being developed in the area of educational gerontology. For example, a number of bibliographies have become available. The most extensive reviewed for the present study was the 153-page document assembled by the University of Michigan-Wayne State University Institute of Gerontology.[1] Excluding the published bibliographies on education for the aging, sixteen references were directly related to the educational needs of older people and colleges or universities. All references were descriptive in nature rather than research-based. So, although the field

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[1]Institute of Gerontology, "General References: Education for Older People." (The University of Michigan-Wayne State University, August, 1971 and August, 1974.)

is growing, much of the work is in preparing professionals to work with older people, studying problems associated with aging and developing "life span" education which includes aging.

Certain baseline information has been helpful in examining the educational needs of older people. For example, an examination of illiteracy rates in this country provided an avenue of exploring why many older Americans find difficulty in a society that is becoming more complex. Successful adaptation depends on the ability to communicate through reading and writing. The 1970 census data revealed:

> The illiteracy rate was highest among older persons. Those 65 years old and over were three times as likely to be illiterate as those under 65. The older persons had completed their schooling when high school education was not the norm as it is today. A significant part of the decline in the proportion illiterate in the total population has resulted from the declining proportion of under schooled persons in the middle and younger years of life. Accordingly, a larger proportion of illiterates was concentrated in the oldest age group in 1969 than in earlier years.[1]

Census data also showed that about one-fourth of the adults in the United States have had some college or university training. This proportion is increasing by decades. Of the total population twenty-five years old and over in 1972, 23 percent had completed at least one year of college. Half of those persons (12 percent) had completed

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[1]U.S., Department of Commerce, Bureau of Census, Population of the United States--Trends and Prospects: 1950-1990, Special Studies Series, P-23, No. 49 (May, 1974), p. 81.

four or more years of college. Twenty years ago, 15 percent of the adult population had completed any years of college and 7 percent had completed at least four years of college.[1] Experiences in institutions of higher education are becoming more prevalent.

The data on educational attainment levels of the older person take on further importance when viewed in terms of the quality of that education. Speaking to this general point, McClusky observed at the time of the 1971 White House Conference on Aging that only one-third of the people 65 years of age or older had continued their education beyond the eighth grade. He added, "In any random sample of the population, the oldest are the most poorly educated. The situation becomes even more serious when we examine the probable quality and relevance of the instruction they received."[2] McClusky noted that the deficit might be corrected if older persons compensated for their lack of schooling by taking part in activities designed specifically for their instruction. But the White House Conference on Aging indicated that persons over age fifty were, by their definition, under-represented in adult educational

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[1] Ibid.

[2] Howard Y. McClusky, "Education for Aging: The Scope of the Field and Perspectives for the Future" in Learning for Aging, ed. Stanley Grabowski and Dean W. Mason (Washington, D.C.: Adult Education Association, 1974), p. 325.

activities and that the degree of under representation increased with the advance in years.[1]

The previous information on educational needs and opportunities for older Americans provided one area of examination in regard to education and the aging. The stereotyped notions about the older person as a non-learner were also examined in light of the appropriateness of educational services in meeting needs of older people. There is a growing literature indicating that the stereotyped relationship between age and intelligence which purports the declining of intellectual capacities is not true. Jacobs and others' review of recent literature in the field of education for aging is devoted to this subject. He reported that:

> . . . [studies] produced ample evidence to refute the concept of invariable progressive decline of mental processes with age. In fact, it may now be said that, barring cerebrovascular (brain) accidents, mental ability, at least of initially superior quality, is ageless; and that assuming continuing health improvement and equalization of educational status and stimulation in the later years of life, the erstwhile observed differences in intellectual performance between youth and older adults may disappear.[2]

Research into the relationship between aging and intellectual capacities has involved both cross-sectional and longitudinal approaches. One of the earliest horizontal

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[1]McClusky, Education: Background and Issues, 1971 White House Conference on Aging (Washington, D.C.: U.S. Government Printing Office, 1971), p. 10.

[2]H. Lee Jacobs, W. Dean Mason, and Earl Kauffman, Education for Aging: A Review of Recent Literature (New York: ERIC Clearinghouse on Adult Education, 1970), p. 10.

studies was conducted by Thorndike.[1] It was from his classic study of rates of learning over time that Thorndike's age curve of learning was derived. The key findings show performance building until age twenty-two and then a decline of approximately .01 percent a year until the age of fifty. Jones and Conrad[2] and Miles and Miles[3] demonstrated similar results in their research.

Longitudinal studies which generally were conducted after the cross-sectional ones, suggest a different picture of intellectual capacities of the older American. Owens tested a group of college freshmen using the Army Alpha.[4] He retested the same subjects when they were fifty years of age and again when they were age sixty-one. Using the same test, he had scores for ages eighteen, fifty, and sixty-one. His results demonstrated that subjects showed a modest gain in performance between their freshman year and age fifty with declines occurring between the ages of fifty and

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[1]E. L. Thorndike, Adult Learning (New York: Macmillan Co., 1928).

[2]H. E. Jones and H. S. Conrad, "The Growth and Decline of Intelligence: A Study of Homogeneous Population Between the Ages of Ten and Sixty," Genetic Psychology Monograph 13 (1933): 233-98.

[3]C. C. Miles and W. R. Miles, "The Correlation of Intelligence Scores and Chronological Age from Early to Later Maturity," American Journal of Psychology 10 (1934): 208-10.

[4]William A. Owens, Jr., "Age and Mental Abilities: A Longitudinal Study," Genetic Psychology Monograph 48 (1953): 3-54.

sixty-one only in numerical ability tests. Schaie and Strother were interested in discrepancies between results from cross-sectional and longitudinal studies relating to processes of aging.[1] In 1956, they administered two intelligence tests (SRA's Primary Mental Abilities and Schaie's Test of Behavioral Ridigity). Seven years later they retested 301 subjects using the same two tests. The test scores reflected four independent dimensions of intelligence which were classified as: 1) crystallized intelligence; 2) cognitive flexibility; 3) visuo-motor flexibility; and 4) visualization. The researchers noted:

> If we analyze the data cross-sectionally (comparing the different age groups at a given point in time) we see the conventional pattern of early systematic decline. But when we look at the results longitudinally (comparing a given age groups' performance in 1956 with its performance in 1963), we find a definite decline on only one of the four measures, visuo-motor flexibility.[2]

The statistical analysis revealed that differences between scores were due not to chronological age, but to generational differences. This is to say that the important factor was the year in which a subject was born, rather than age at the time of testing. According to Baltes and Schaie, the measured intelligence of the population is increasing and earlier findings of "general intellectual decline over

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[1] K. Warner Schaie and Charles R. Strother, "A Cross-Sequential Study of Age Changes in Cognitive Behavior," Psychological Bulletin 70, No. 6 (Dec., 1968): 671-80.

[2] Paul B. Baltes and K. Warner Schaie, "The Myth of the Twilight Years," Psychology Today 7, No. 10 (March, 1974): 40.

the individual life span were largely an artifact of methodology."[1]

Finally and in a similar vein, Riley reported that social change and individual aging are so intertwined that each can only be understood in relationship to the other. "Yet such widely used approaches as the longitudinal cross sectional designs deal only with selected components of aging while methods for studying social change often fail to take into account the relevant changes in the age structure of the succession of cohorts affecting the society."[2] Riley suggested that a more complete understanding of the underlying processes of aging in the context of social change requires various elaborations of the conventional approaches, elaborations which still need integration and development for application in sociological and educational research.

There seems to be gaining acknowledgment, supported by research, of the capacity of the older person as a learner and little doubt about the educational deficiencies or gaps, in large numbers of older people. In terms of educational planning, the older learner of the future will be most unlike the older learner of yesterday.

> It would be a grave error to take the older age stratum as it appears today as a model of tomorrow's aged. Better educated, in better health, with different work

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[1] Ibid.

[2] Matilda White Riley, "Work in Progress on Aging and Society,": 106-7.

> experiences, having experienced a distinctive historical milieu in growing up, the aged of tomorrow may little resemble today's older people. Social planning for the aged will need to anticipate those differences.[1]

Senior Learners and the University

The next set of literature pertinent to the study dealt with evidences of educational programming that have been developed for the senior learner. Is there evidence, for example, that higher education through traditional or non-traditional programs has begun to take the senior learner's needs into account? The older American has traditionally been considered a candidate for extension or continuing education activities as opposed to a candidate for regular on-campus studies as observed in Jacobs et al.[2] Or senior learners have been clustered together within a category of "adult learners" which includes anyone who is over age twenty-four. Regardless of format, the senior learner has usually been labeled a special learner and has not been regarded as a serious academic student.[3]

In 1971 the Commission on Non-Traditional Study was formed and Samuel B. Gould was appointed chairperson. The

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[1]Vern L. Bengston, Patricia L. Kasschau, and Pauline K. Ragan, "The Impact of Social Structure on Aging Individuals" in Handbook of the Psychology of Aging, ed. James E. Birren and K. Warner Schaie (New York: Van Nostrand Reinhold Company, 1977), p. 347.

[2]Jacobs, et al., Education for Aging, pp. 51-82.

[3]Robert A. Sarvis, Educational Needs of the Elderly: Their Relationships to Educational Institutions (Final Report, Office of Education, U.S. Department of Health, Education and Welfare, 1973).

Commission was sponsored by the College Entrance Examination Board and the Educational Testing Service and funded by the Carnegie Foundation. As part of the two-year study, the Commission developed fifty-seven specific recommendations for action. The report and recommendations represented the thinking of specialists in the field. The Commission's report focused on lifelong learning and flexibility, but the senior learner did not receive specific nor detailed attention. In the report, Diversity by Design, data from "would-be-learners" clearly indicated that:

> . . . to a very large number of American adults, education--however much desired--is still too costly, too rigid in its formal requirements, and too inaccessible at the places and times it is needed. Moreover, several of the reasons (obstacles) suggest the need for greater information, counseling, and individualized reassurance and reinforcement.[1]

The Commission envisioned that federal monies available through the Educational Amendments of 1972 (P.L. 92-318) to the Higher Education Act of 1965 would provide the needed assistance to educational agencies to overcome the obstacles identified in the report.[2]

Although the study was rich in information, demographic details regarding respondents were not specific. "A representative sample of approximately 104 million persons eighteen to sixty, exclusive of full-time students,

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[1]Commission on Non-Traditional Study, Diversity by Design (San Francisco: Jossey-Bass Publishers, 1973), p. 19.

[2]Ibid., p. 19-20.

living in private households in the United States was chosen in the Summer of 1972."[1] No subjects over age sixty were utilized and data regarding younger aged senior learners were not isolated.

The Carnegie Commission on Higher Education engaged in study efforts which involved senior learners. The Commission's primary concerns were directed toward women and black students, rather than toward older students. In sections 5 and 8 of New Students and New Places, the Commission recommended an "increased emphasis on adult education, especially in the 1980's, when institutions will be in a particularly favorable position to expand adult programs because of stationary populations."[2]

The Commission was careful to say that although there are indications that enrollment of adults in higher education has been increasing rapidly in recent years, it remains difficult to arrive at accurate estimates on the basis of existing data. They did not precisely define what they meant by "adult enrollment," but this group included young adults who have "stopped out."[3] The Commission conservatively estimated that 500,000 to 600,000 adult students

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[1]Ibid., p. 15.

[2]Carnegie Commission on Higher Education, New Students and New Places: Policies for Future Growth and Development of American Higher Education (New York: McGraw-Hill Book Co., 1971a), p. 50.

[3]Ibid.

will increase total enrollment figures by the year 1990, and one million students by the year 2000 as a result of increased interest in adult education.[1] In another document from the Commission, the major recommendation was:

> . . . open access opportunities in every state of the nation for all high school graduates--even all adults--who wish post secondary education . . . [and] measures to overcome educational disadvantages due to race, sex, family income, geographical location, age and inadequacies of prior schooling.[2]

However, in general the Commission regarded declining university enrollment rates as a function of declining birth rates. Little concern from the Commission was directed towards recruiting older students. The Commision has assumed that predominantly young people will be going to college and that faculty adjustments based upon declining enrollments will have to be made. The recommendations have been directed toward reducing faculty numbers and increasing "faculty flexibility" (no tenure, earlier retirement ages, temporary and part-time help, and so on).[3]

The State of Oklahoma in Oklahoma Higher Education: A State Plan for the 1970's - Revision and Supplement broadened its perspective somewhat. In discussing positive

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[1] Ibid., p. 60.

[2] Carnegie Commission on Higher Education, A Chance to Learn: An Action Agenda for Equal Opportunity in Higher Education (New York: McGraw-Hill Book Co., 1970a), p. 49.

[3] Carnegie Commission on Higher Education, The More Effective Use of Resources: An Imperative for Higher Education (New York: McGraw-Hill Book Co., 1972), p. 42.

indicators for the future, the report stated:

> Even though the traditional college-age population (18-24) will decline by about 15 percent during the 1980's, the nontraditional market (25-44) will increase by more than 25 percent during that same period, providing the opportunity for institutions to serve this new and expanding population group.[1]

The report further suggested that the downturn in students will not occur until the early 1980's and that the state will have time to develop new strategies and retrenchment mechanisms.[2] Further, adult learners are discussed in the section on "Extension and Public Service." Again, in the state report learners over age forty-four were not considered "regular" students and were primarily seen as consumers of continuing education-like activities.

Non-traditional programs primarily using market research studies have included senior learners in their population.[3] The situation is identified by K. Patricia Cross of the Educational Testing Service:

> So adult learners do challenge the heart of higher education--the curriculum. But equally important--and more likely to succeed--is their challenge to the time and place requirements of traditional education . . . We need new measures of competency that acknowledge that what is learned rather than how it is learned is the true measure of education. And we need new

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[1]Dan S. Hobbs, Oklahoma Higher Education: A State Plan for the 1970's--Revision and Supplement (Oklahoma State Regents for Higher Education, April, 1976), p. 11.

[2]Ibid.

[3]Velma A. Adams, "Adult Education: Where the Bread and Action Are," College Management 8, No. 4 (April, 1973): 9-14.

flexibilities that can make lifelong learning a reality.[1]

Non-traditional responses may take form within existing institutions or may represent new institutional delivery systems. Examples of university responses to educational needs of older Americans are diverse and include: the Institute for Retired Professionals (IRP) at the New School for Social Research in New York; American Association of Retired Professionals (ARP) program at Temple University; Center for Learning in Retirement (CLIR) at San Francisco's New College of California; Institute for Continued Learning (ICL) at the University of California at San Diego-La Jolla; and the University of San Francisco's Fromm Institute for Life-Long Learning (for men and women over age fifty). These institutional responses are designed specifically for senior learners. Other college and university programs accommodate and encourage participation of senior learners.[2]

There are also special non-traditional programs which include senior learners that are both extensive and innovative. The State University of Nebraska (SUN) established a postsecondary learning delivery system in January,

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[1]K. Patricia Cross, "The New Learners" in On Learning and Change (New Rochelle: Change Magazine, 1973), p. 72.

[2]John J. Spinetta and Tom Hickey, "Aging and Higher Education: The Institutional Response," The Gerontologist 15, No. 5, part I (October, 1975), pp. 431-35.

1975. Although initially focused on the State of Nebraska, the University of Mid-America expanded to include the University of Nebraska, Iowa State University, the University of Kansas, Kansas State University, the University of Missouri, the University of Iowa, the University of Minnesota, the University of South Dakota, and South Dakota State University. The nine university presidents are the board of trustees for UMA which is headquartered next to the University of Nebraska's Educational Television Center in Lincoln.[1] The delivery system is a combination of learning centers and television programming. In 1977, UMA served nearly 6,500 students scattered across six states. The data on ages of students do not indicate the extent to which senior learners enroll.

The University Without Walls (UWW), a general project sponsored by the Union for Experimenting Colleges and Universities, was established in 1971. The program is administered differently by each of the twenty participating institutions. Each program is designed independently so that: (1) students, faculty, and administrators design and develop the program; (2) a broad mix of resources--including regular courses, research assistantships, internships, field experience, and independent study are used; (3) there is no

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[1]University of Mid-America, A Model Regional Open Learning System (Proposal to the National Institute of Education, October 15, 1974).

fixed curriculum and no fixed time for the award of a degree; (4) a broad age range of students (16 to 60 or older) is included; (5) adjunct faculty is used; (6) continuing dialogue between student and faculty is maintained; (7) seminars are devoted to the development of skills for independent learning; (8) programs and resources of other UWW participants are open to all; (9) each student must produce a "major contribution" (a research study, work of art, publishable article, and so on); and (10) the achievement of graduates is to be researched.[1] Demographic data on students do not show the level of involvement of senior learners.

Another in the range of examples is courses by newspaper. This concept was launched by a grant from the National Endowment for the Humanities in 1973. The program takes advantage of an existing medium, the newspaper, to provide relatively inexpensive educational opportunities to millions of Americans. The newspaper lessons are distributed without charge by the Copley News Service. Total circulation of newspapers participating in the first course was about twenty million with readership estimated at two or two and one-half times that figure. Evaluation of the project was sponsored by the Exxon Education Foundation.

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[1]John R. Valley, "External Degree Programs" in Explorations in Non-Traditional Study, ed. Samuel B. Gould and K. Patricia Cross (San Francisco: Jossey-Bass Inc., Publ., 1972), pp. 95-126.

The newspapers publish a weekly 1,400-word lecture by scholars of national reputation. Information regarding local colleges or universities that give credit for the course is distributed by participating newspapers. Each participating institution provides a teacher-coordinator who conducts two contact sessions. The instructor also gives an exam and assigns grades. About one hundred and eighty colleges participated in the first course program.[1] No information is available on age distribution of participants.

In summary, it has been demonstrated that senior learners receive services from institutions. Those services are either part of programs designed for all adult learners or are programs for older Americans that are set apart from other college and university programs. By and large, higher education responses are non-traditional approaches to higher education. The literature does not include reports of programs that consider the senior learner attending classes for credit, seeking a degree or otherwise making use of the more traditional university programs.

Need Theory

In order to study educational needs of senior learners, an approach to understanding common human needs which would be consistent with continuance or activity

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[1]Caleb A. Lewis, "Courses by Newspaper" in Lifelong Learners - A New Clientele for Higher Education, ed. Dyckman W. Vermilye (San Francisco: Jossey-Bass Publ., Inc., 1974), pp. 67-71.

theory was considered necessary. Additionally, a definition of need is central to a conceptual framework for assessing needs. The field of humanistic psychology was considered appropriate because its basic principles have been identified as positive, holistic and growth oriented. Because the theorists in this area see humankind as both "striving" and as being influenced by a combination of internal and external or environmental determinants, responses to needs may occur outside the individual in achieving need satisfaction.

Maslow has been identified as humanistic psychology's preeminent exponent. In 1943, he first expounded his theory of a need hierarchy:

> Human needs arrange themselves in hierarchies of potency. That is to say, the appearance of one need usually rests on the prior satisfaction of another, more prepotent need. Man is a perpetually wanting animal . . .[1]

In a later work, Maslow identified three underlying assumptions necessary for a sound theory of need: 1) the individual is an integrated whole; 2) most desires and drives in the individual are interrelated; and 3) while the methods of need satisfaction vary greatly among races and cultures, the ultimate ends seem to be identical. He also stated that needs are "not bad but either neutral or good."[2]

He identified five levels of needs: physiological, safety and security, love and belongingness, self esteem and

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[1]Maslow, "A Theory of Human Behavior": 370-96.

[2]A. H. Maslow, Motivation and Personality (New York: Harper and Row, Publishers, 1954), pp. 63-79.

esteem by others, and self-actualization.[1] These needs were described as being organized into a hierarchy of relative prepotency. That is to say, a lower level of need must be satisfied before the individual can become concerned with a higher level of need. However, Maslow was careful to say that all needs are interrelated. For example, a person who thinks he or she is hungry may actually be feeling a lack of love, belongingness, or some other need. He contended that throughout life, the human being is practically always desiring something, is a wanting human being and "rarely reaches a state of complete satisfaction except for a short time. As one desire is satisfied, another pops up to take its place."[2] Maslow derived his determination of what constitutes a need by studying healthy persons, i.e., those people whose basic needs had been satisfied and who were motivated by self-actualization needs. This approach resulted in a two-fold classification of needs, basic and growth. Basic needs reflect a deficit in the individual, "empty holes, so to speak which must be filled up for health's sake."[3] A definition of basic needs is drawn from an examination of the long run deficiency characteristics of these needs. According to Maslow, a characteristic may

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[1]Maslow, "A Theory of Human Behavior,": 370-96.

[2]Maslow, Motivation and Personality, p. 69.

[3]A. H. Maslow, Toward a Psychology of Being, 2d ed. New York: D. Van Nostrand Company, 1968), pp. 22-23.

be considered a basic or instinctive need if:

1. its absence breeds illness,
2. its presence prevents illness,
3. its restoration cures illness,
4. under certain (very complex) free choice situations, it is preferred by the deprived person over other satisfactions,
5. it is found to be inactive, at a low ebb, or functionally absent in the healthy person.[1]

Growth needs, on the other hand, are experienced once basic needs are satisfied. A state of health (a total state of well-being) is experienced when the person is motivated primarily by the growth needs. Maslow noted that characteristics of this healthy growth-oriented state include:

1. Superior perception of reality.
2. Increased acceptance of self, of others and of nature.
3. Increased spontaneity.
4. Increase in problem-centering.
5. Increased detachment and desire for privacy.
6. Increased autonomy, and resistance to enculturation.
7. Greater freshness of appreciation, and richness of emotional reaction.
8. Higher frequency of peak experiences.
9. Increased identification with the human species.
10. Changed (the clinician would say, improved) interpersonal relations.
11. More democratic character structure.
12. Greatly increased creativeness.
13. Certain changes in the value system.[2]

Figure I illustrates several aspects of Maslow's basic theory of need and incorporates the notions of basic and growth needs. The individual and his or her system of needs is represented by the heavy black line suggesting the wholeness of the individual and the innate source of all

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[1] Ibid.

[2] Ibid., p. 27.

needs. The line is interrupted with arrows coming into and leading out of the individual system which conveys that the individual both influences and is influenced by the external

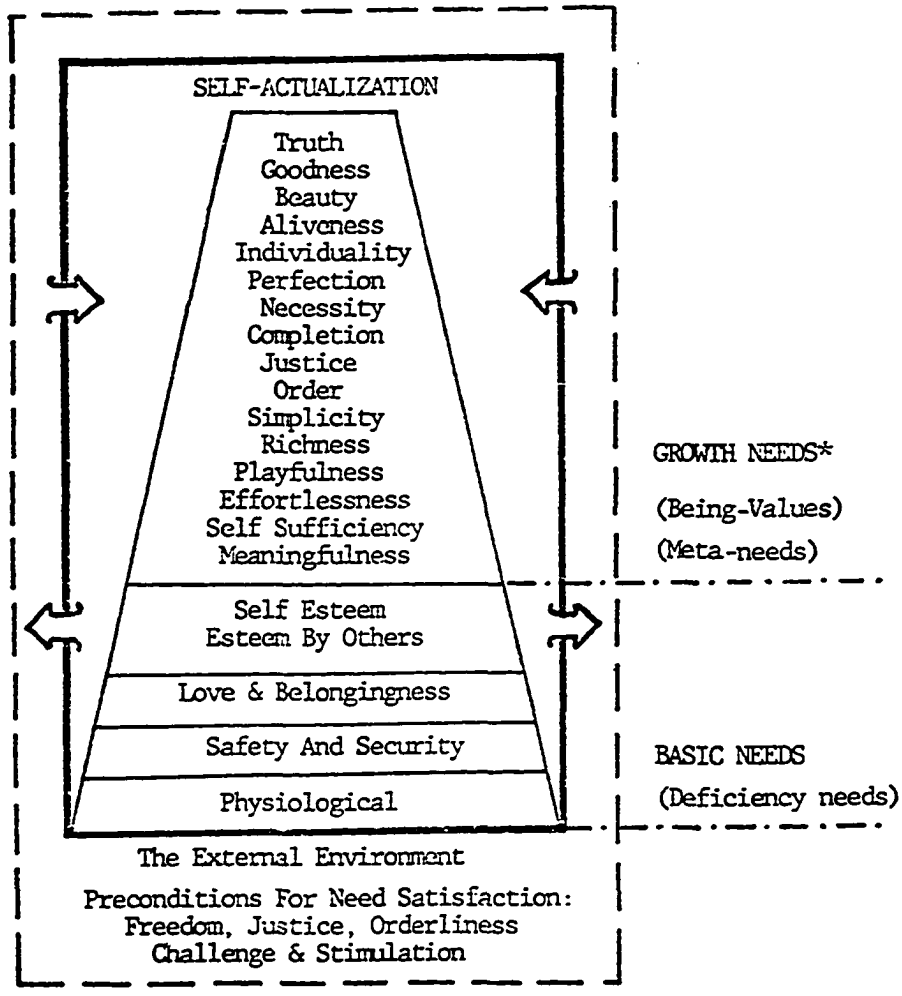

Figure 1. Abraham Maslow's Need Theory[1]

[1]This figure is adapted from Frank Goble, The Third Force: The Psychology of Abraham Maslow (New York: Grossman Publishers, 1970), p. 52. In addition to Goble's basic figure, the concept of external and internal feedback outside the individual's need system is illustrated.

environment. The external environment is represented by a broken line because its form is ever-changing. Included in the external environment are certain pre-conditions which in Maslow's construction were required for need satisfaction.[1] Each of the five levels of need are innate to the individual and are arranged hierarchially and sequentially.

The basic needs are prepotent. The first level of the need hierarchy is the physiological need level. Included in this level are the basic survival imperatives such as the need for sleep, food, procreation, shelter, and warmth.[2] If this level of need is unsatisfied and the individual is dominated by physiological needs, all other needs may become nonexistent or pushed into the background. Also, Maslow observed that those individuals in whom a certain need has always been satisfied are best equipped to tolerate deprivation of that need in the future.

Safety needs represent the second of the need levels. Together with physiological needs, they may wholly dominate the individual and serve exclusvely as organizers of behavior. These needs are described as: freedom from fear, anxiety, and chaos; need for structure, order, law and limits; and security, stability, and dependency.[3]

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[1]Maslow, Motivation and Personality, p. 92.

[2]Maslow, Motivation and Personality, 2nd ed. (New York: Harper and Row, Publishers, 1970), pp. 35-38.

[3]Ibid., pp. 39-43.

If these needs are generally met, then in terms of Maslow's notion of relative prepotency, the love, affection, and belongingness needs will appear. This level is characterized by a "hunger for affectionate relations with people in general, namely, for a place in his group, and he will strive with great intensity to achieve this goal."[1] This "hunger" will become the motivating factor in the individual's life. Maslow went on to say that, "practically all theorists of psychopathology have stressed thwarting of the love needs as basic in the picture of maladjustment."[2] Society is ambivalent about these needs and there are restrictions and inhibitions attached to them.

The esteem needs are divided into two subsidiary sets: 1) desire for strength, achievement, adequacy, mastery and competence, confidence in the world, and for independence and freedom; (Maslow was unwilling to categorize this as a universal need citing that for an individual born into bondage, the presence of this need level is not documented)[3] and 2) desire for reputation or prestige (from other people), status, dominance, recognition, attention, importance, or appreciation.

> Satisfaction of the self-esteem need leads to feelings of self-confidence, worth, strength, capabilities, and adequacy, of being useful in the world

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[1] Ibid., p. 43.

[2] Ibid., p. 44.

[3] Ibid., p. 45.

> . . . [But] the most healthy self-esteem is based on deserved respect from others rather than an external fame or celebrity and unwarranted adulation.[1]

Even if all these needs are satisfied, individuals may experience a new discontent or restlessness, "What a man can be, he must be."[2] Maslow called this the need for self-actualization.

> . . . healthy people have sufficiently gratified their basic needs for safety, belongingness, love, respect and self-esteem so that they are motivated primarily by trends to self-actualization (defined as ongoing actualization of potentials, capacities and talents, as fulfillment of mission [or call, fate, destiny, or vocation], as a fuller knowledge of, and acceptance of, the person's own intrinsic nature, as an unceasing trend toward unity, integration or synergy within the person).[3]

Self-actualization then is "to become everything that one is capable of becoming."[4] These needs constitute what Maslow termed meta-needs, being-values, or growth needs. These terms are interchangeable and describe the ultimate needs: self-actualization and aesthetic needs. He described the latter as a need or craving for beauty.

According to Maslow the being-values are intrinsic, absolute and they cannot be reduced. In contrast to the basic or deficiency needs which are hierarchial and pre-potent, being-values are facets of being, part of an

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[1]Ibid., p. 45.

[2]Ibid., p. 46.

[3]Maslow, Toward a Psychology of Being, p. 25.

[4]Maslow, Motivation and Personality, 2nd ed., p. 46.

integrated whole. There are no prepotency or hierarchial relationships among these characteristics.[1]

In the 1970 edition of Motivation and Personality, Maslow qualified and somewhat modified the notions of hierarchy and prepotency. He acknowledged that the order of needs was not fixed for all people and that "within the sphere of motivational determinants any behavior tends to be determined by several or all of the basic needs simultaneously rather than by one of them."[2] With this revision, he recognized the multiple determinants of behavior, degrees of need satisfaction and relative order of the hierarchy of needs.[3] His hierarchy could then be portrayed as a series of skewed curves, represented in Figure 2. As can be derived from Figure 2, a need does not appear quickly, but rather may slowly emerge. It may be present in some form for long periods of time--or for the rest of an individual's life.

It should be reiterated that needs are not the only determinants of behavior. Maslow reported that behavior may be determined by several of the basic needs in combination, by personal habits, by past experience, by individual talents and capacities, and by the external environment.[4]

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[1]Maslow, Toward a Psychology of Being, p. 83.

[2]Maslow, Motivation and Personality, 2d ed., p. 55.

[3]Ibid., pp. 51-58.

[4]Ibid., pp. 53-55.

Maslow addressed the importance of the environment by noting:

> We must certainly grant at once that human motivation rarely actualizes itself in behavior except in relation to the situation and to other people. Any theory of motivation must of course take account of this fact, including not only in the environment but also in the organism itself, the role of cultural determination.[1]

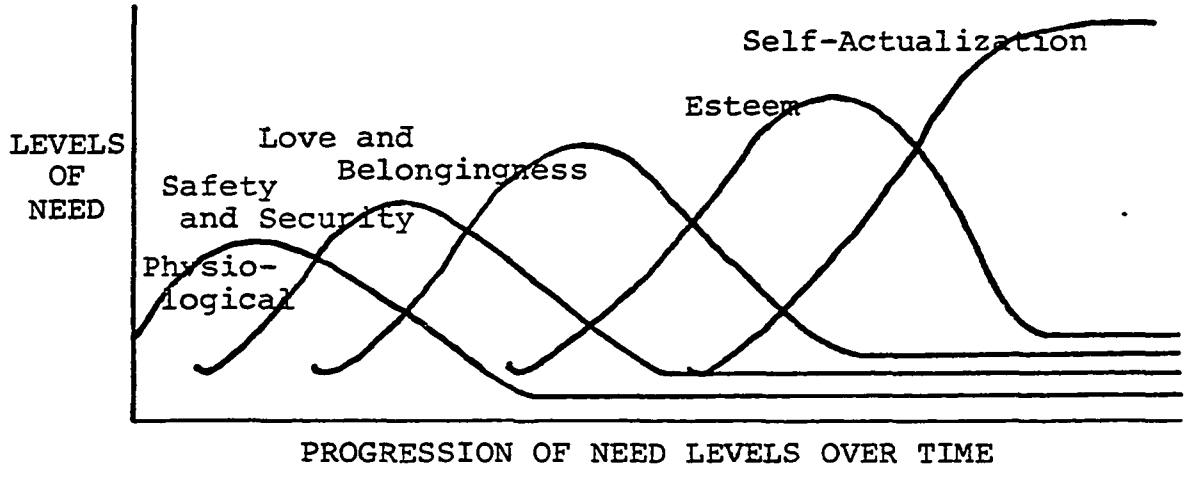

Figure 2. Maslow's progression of need levels over time as described in the second edition of Motivation and Personality.

Maslow was careful to say that he attempted to "separate the concept of mature, fully human, self-actualizing people in whom the human potentialities have been realized and actualized from the concept of health at any age level."[2] In other words, health represents a "good-growth-toward-self-actualization" process that culminates

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[1]Ibid., p. 47.

[2]Ibid., p. 150.

when, and only when, self-actualization has been reached.[1] Young people may be healthy, but probably not self-actualized.

> It is my [Maslow] impression that healthy young men and women tend to be still growing, likeable, and even lovable, free of malice, secretly kind and altruistic (but very shy about it), privately affectionate of those of their elders who deserve it. Young people are unsure of themselves, not yet formed, uneasy because of their minority position with their peers (their private opinions and tastes are more square, straight, meta-motivated, i.e., virtuous, than average).[2]

Certain characteristics of self-actualization or being-values may exist in young people but Maslow suggests that only longitudinal studies can determine their movement to self-actualization.[3]

Of particular interest to the present research is that Maslow saw self-actualization as a process confined "very definitely to older people."[4] Mature individuals see their own identity, or autonomy. They have had time and opportunity to find their life's work, to develop enduring and loyal relationships, to experience responsibilities, to develop their own value system, and to deal with their own finiteness. It is through these, and other experiences that individuals move toward self-actualization.

The literature also provided a need approach with strong educational implications. The approach is based upon

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[1] Ibid.

[2] Ibid., Preface, pp. xx-xxi.

[3] Ibid.

[4] Ibid., p. 150.

a formulation by McClusky. His approach to understanding needs and the educational components to needs are remarkably similar to the earlier work of Maslow but are focused entirely upon older Americans and "educational needs." His work appears in connection with the 1971 White House Conference on Aging and his need formulation has appeared in several forms and forums associated with the Conference. His "psychology of adult potential" offers a way of understanding adult growth and change as related to educational content areas.[1] McClusky noted that, "there are as yet few deliberate and systematic attempts to formulate a position from which to develop a differential psychology of the adult years," which he defined as age fifty and above.[2] He used the specific age of fifty because his studies indicated that "up to about age fifty, middle class adults do not seriously question their ability to take part in activities requiring learning, but with other factors constant, after fifty, doubts about the capacity to learn begin to appear."[3] As a partial explanation, he suggested that time perception offers one understanding; that is, at age fifty, individuals note that life is not ahead of them, but rather that they

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[1]Howard Y. McClusky, "An Approach to a Differential Psychology of the Adult Potential," in The Adult Learner: A Neglected Species by Malcolm Knowles (Houston: Gulf Publishing Co., 1973), pp. 142-59.

[2]Ibid., p. 143.

[3]Ibid., p. 149.

are past the midway point in life and much of life is in the past.

McClusky identified five stages or levels of need for Persons in the Later Years (PLY): coping, expressive, contributive, influence, and the need for transcendence.[1] In developing and expanding his need levels, he identified education as a particular means through which need satisfaction occurs.

His formulation, which he called a "Margin Theory of Needs," bears several striking resemblances to Maslow's need theory although he does not cite Maslow. The commonalities include a hierarchial view of human needs; a range of needs which appears over time; a holistic view; and sequential categories that are not mutually exclusive. Both formulations of need speak to growth, creativity and transcendance.[2] However, of primary importance to this study, both writers concern themselves with a drive for knowledge and full development that is universal and continuing. McClusky's formulation is pertinent because it is based in study of older Americans and gives special attention to their educational needs. Also, he operationally defined some educational needs.

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[1]Howard Y. McClusky, Education: Background and Issues, 1971 White House Conference on Aging (Washington, D.C.: U.S. Government Printing Office, 1971).

[2]Ibid., pp. 325-55.

Alderfer's concept of need stages is a direct outgrowth of Maslow's work. His need concepts may be roughly equated with Maslow's and they afford the opportunity of applicability. His three need levels are: Existence, Relatedness and Growth (or generativity) (E.R.G.).[1]

> Each of the three basic needs in E.R.G. theory were defined in terms of a process through which, and only through which, satisfaction could be obtained. For existence needs, the targets were material substances, and the process was simply getting enough . . . . For relatedness needs, the targets were significant others (persons or groups) and the process was mutual sharing of thoughts and feelings. For growth needs, the targets were environmental settings, and there were joint processes of a person becoming more differentiated and integrated as a human being.[2]

Alderfer's basic criticism of Maslow was that his theory of need did not focus on an equilibrium or exchange between the individual and the context or environment in which the individual lives.

> . . . the notion of specifying different settings for obtaining satisfaction is not present [in Maslow] . . . By identifying the role of ecological environments, the growth concept [in Alderfer] recognizes the role of factors external to a person not only in supporting his growth but also in stimulating it. The skills and talents a person may wish to use and develop depend not only on his innate characteristics but also on the challenges and opportunities provided by the specific settings in which he finds himself.[3]

Because E.R.G. theory is based upon seven major propositions, Alderfer firmly stated that empirically

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[1]Clayton P. Alderfer, Existence, Relatedness, and Growth: Human Needs in Organizational Settings (Glencoe, Ill.: Free Press, 1972).

[2]Ibid., pp. 12-13. [3]Ibid., p. 26.

testable hypotheses relating satisfaction to desire could be logically derived:

> The form of this derivation is as follows. If A is an operational indicator of an E., an R., or a G. satisfaction and B is an operational indicator of an E., an R., or a G. desire, then A should show an empirically verifiable relationship to B in such a way as predicted by one of the E.R.G. propositions. If empirical results provide support for the A to B relationship, then one can have more confidence in the theory.[1]

According to Alderfer's framework, his need theory provides an opportunity for empirical testing.

Alderfer described four general ways in which E.R.G. theory and Maslow's need theory differed. Basically the differences are in: 1) how many need categories there are and how they are formed; 2) the presence or absence of a strict prepotency assumption; 3) how frustration of higher-order needs affects lower-order desires; and 4) how chronic desires relate to satisfaction.

> These major differences in turn lead to the theories' making different predictions at a number of points. In some cases, E.R.G. theory makes predictions where Maslow's theory makes none.[2]

Figure 3 illustrates a comparison between Alderfer's need categories and the Maslovian hierarchy.

Alderfer's E.R.G. theory proposes that physical illness, pain and assault be combined with Maslow's physiological category and thereby fit the existence need category. Also, that "Safety issues involving interaction with

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[1] Ibid., p. 13.

[2] Ibid., p. 24.

other people would be considered part of love needs and thereby, included with relatedness needs."[1]

MASLOW's Categories	E.R.G. Categories
Self-Actualization	Growth
Esteem-Self-Confirmed	
Esteem-Interpersonal	Relatedness
Love (belongingness)	
Safety-Interpersonal	
Safety-Material	Existence
Physiological	

Figure 3. Comparison of Maslow and E.R.G. concepts[2]

Alderfer also felt the same point applied to Maslow's esteem needs. Needs that Maslow identified as the regard a person receives from others are included in relatedness needs. However, the aspect of esteem which depends upon

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[1]Ibid., p. 25.

[2]This figure is adapted from Alderfer, Existence, Relatedness and Growth, p. 25.

internal cues such as a sense of capacity, achievement, and independence was more clearly related to self-actualization according to Alderfer. Therefore, the theory proposes that those aspects of esteem which depend upon reactions from others be included with relatedness needs while those which represent autonomous, self-fulfilling activity fit with growth needs.

The concepts in Alderfer's need theory are compatible with Maslow's need hierarchy. Alderfer's contribution to the present research's concept of need is that he defines E.R.G. categories as progressing from existence or dependence, to relatedness or interdependence, to growth or independence. The relationships between Maslow's and Alderfer's need theories to the continuum of dependence to interdependence is illustrated in Figure 4. The concepts of E.R.G. and their congruence with independence, interdependence and dependence serve as an organizing framework for conducting an approach to assessment of need.

In summary, this section on theories pertaining to human needs has served to introduce some of the difficulties faced by those interested in operationalizing the concept of need in need assessment research, e.g., what is a human need?

Need Assessment Research

The writings in this section serve to define need assessment and note its relationship to the planning process.

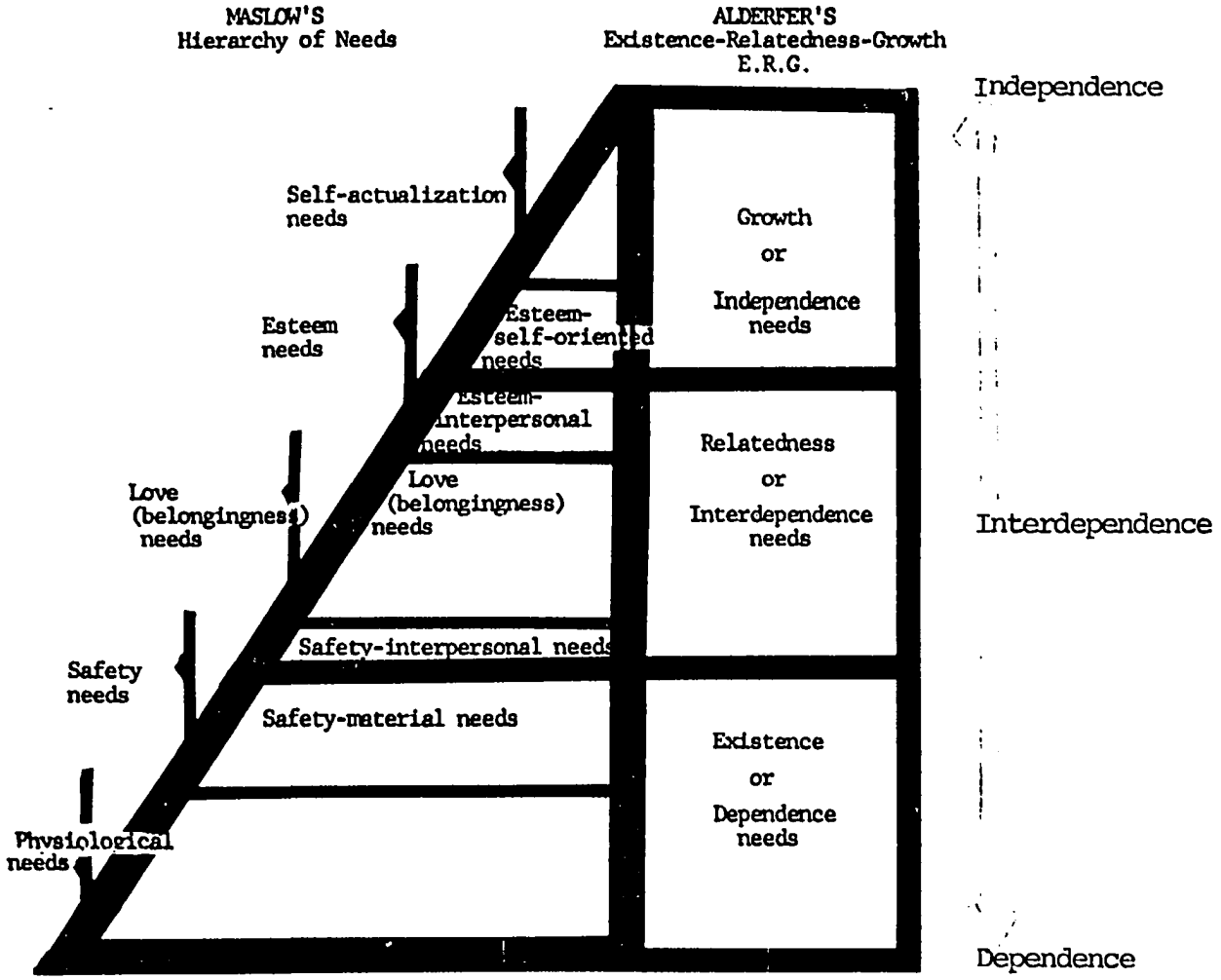

Figure 4. The need theories of Maslow and Alderfer and their relationships to the continuum of dependence, interdependence and independence needs.

Further, relevant aspects of this literature are summarized and the point is established that conceptualizations of human need are becoming increasingly important in justification measures for the planning of human services programs.

In recent years there has been increasing emphasis on use of research methodologies in acquiring, analyzing, and disseminating information about human need and programs to meet needs.[1] The identification of needs or problems to be resolved through allocation and delivery of services took on a more specific focus with development of the citizen participation movement of the 1960's.

According to a December, 1977, publication of the Department of Health, Education, and Welfare, need assessment activities were required in twenty-eight of the Department's largest grant-in-aid programs and "presumably thousands of need assessments have been created in response to federal requirements" in the twelve year history of need assessment activities.[2] And though a requirement may be absent in a given law, twenty-three sets of federal regulations clearly require a need assessment.[3] The report

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[1]U.S., Department of Health, Education and Welfare, Analysis and Synthesis of Needs Assessment Research in the Field of Human Services (Center for Social Research and Development: Denver Research Institute - University of Denver, July 1974), p. 65.

[2]U.S., Department of Health, Education and Welfare, Office of the Assistant Secretary for Planning and Evaluation, Need Assessment: A Critical Perspective (December, 1977), p. 3.

[3]Ibid., p. 4.

further noted that

> . . . the results of the need assessment are almost always part of the material submitted to Federal officials as a pre-condition for obtaining a grant, usually in the State plan (for formula grant programs) or application (for project grant programs). Thus, need assessment is viewed by the writers of legislation and regulations as an integral part of the planning process.[1]

Also addressed in the report are the problems created by lack of agreement on what constitutes a need, i.e., the conceptual bases for a given need assessment application. After reviewing the literature, the report offers the following definition of need assessment, "an act of estimating, evaluating or appraising a condition in which something necessary or desirable is required or wanted."[2] This definition seeks to bridge the problems associated with the multiple uses of the notion of need assessment.

One of the most prominent program areas necessitating this type of research has been social services. With passage of Title XX to the Social Security Act in 1975 (P.L. 93-647, Part A), formal need assessment became a mandated activity for every state. Title XX requires a Comprehensive Annual Social Services Program Plan. As part of the process of creating a plan, each state is required by law and regulation to demonstrate that an assessment of need for planned services has been conducted. This mandated activity

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[1]Ibid., p. 3.

[2]Ibid., p. 12.

reflects concern for the rate of increased expenditures for social services and concern for the amount or quality of information available about the use and effectiveness of the expenditures. Hence, recent increases in need assessment activities and research may be attributed to the position that social planning and resource allocation decisions should be responsive to the concerns and needs of the target population and that, when possible, these needs should be ascertained through an objective process involving consumers.[1]

Those persons responsible for the planning of social programs aimed at ameliorating problems (responding to deficits in basic human needs) have given particular attention to the concept of need assessment. From an educational perspective, Bowers concluded that all community education programs at one time or another have also employed need assessment techniques. He views this process as the means by which educational programming is adjusted to changing needs. Bowers considers need assessment both as establishing justification for programming efforts and as an integral part of the total planning process. Bowers' perspective on need assessment tends to be related to the growth and developmental potential of people as opposed to a deficit conception of needs.[2]

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[1]U.S., Department of Health, Education and Welfare, Need Assessment: A Critical Perspective, p. 4.

[2]Bowers and Associates, A Guide to Needs Assessment in Community Education Programs (Reston, Virginia: January, 1976), p. 3.

Need assessment research by definition is change-oriented research. "It reflects a desire to change social arrangements in order to bring them closer to what some group considers a better state of affairs."[1] The purpose of need assessment studies and research is determination of the extent and characteristics of need as a basis for planning and developing services. It attempts to define what is required to insure that a population is able to function at an acceptable level in specific domains of living.[2]

Figure 5 summarizes comparisons of various need assessment techniques in terms of strengths and weaknesses. Planning staff in human services agencies in selected states were asked by The Research Group to rank and compare ten commonly used need assessment techniques. General population and target population surveys were viewed by these planners as particularly useful assessment techniques.[3] The strengths of the survey of target populations (those who are using the service) were associated with the first hand knowledge of the program and knowledge of accessibility and utilization problems associated with actual use. Also important was the

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[1]Robert Perlman and Arnold Gurin, Community Organization and Social Planning (New York: John Wiley and Sons, Inc., 1972), p. 13.

[2]U.S., Department of Health, Education and Welare, Analysis and Synthesis of Needs Assessment Research in the Field of Human Services, p. 7.

[3]U.S., Department of Health, Education and Welfare, Techniques for Needs Assessment (The Research Group, Inc., July 1976), pp. 43-53.

Selected Areas for Comparison	ALTERNATIVE TECHNIQUES									
	General Population Survey	Target Population Survey	Service Providers Survey	Key Respondent Survey	Review of Secondary Information	Needs Indicators Series	Review of Management Information	Review of Other Human Services Systems Needs Info.	Hearings	Review of Budets and Legislation
A. Use existing methodologies	4	4	4	4	4	2	4	2	5	4
B. Complement other techniques	5	4	4	3	5	3	4	2	2	4
C. Use existing staff	2	2	3	4	3	2	3	4	4	3
D. Flexibility of technique	4	4	3	4	4	4	2	3	4	4
E. Cost	1	2	3	4	4	3	1	2	5	4
F. Amount of time required	1	1	2	3	3	4	3	4	4	4
G. Staff/manpower required	1	1	3	2	3	3	2	2	4	4
H. Validity of results	5	4	3	3	2	3	3	3	1	2

Description of Ranking Used to Compare Techniques

In order to compare approaches, each technique is ranked according to the following scale in each of the eight areas:

1 - very weak in this area,
2 - weak in this area,
3 - average in this area,
4 - above average in this area,
5 - superior when compared to all other techniques in this area.

Figure 5. Ranking and comparison of alternative need assessment techniques in eight selected states.[1]

[1]U.S., Department of Health, Education and Welfare. Techniques for Needs Assessment, p. 11.

underlying assumption that since these people are currently using the service, they are demonstrating need satisfaction behaviors and one can learn about the motive of the need by studying such individuals.

The selection of assessment techniques should be based upon the kind of data needed and the purposes to be served by the information. Generally speaking, a combination of both perceptual and empirical methods helps to overcome some of the validity and reliability problems inherent in any single technique.[1] The several organizational factors which should be taken into account in selecting a need assessment methodology are funds, time, personnel, public acceptance, and available data.[2]

In addition to the general classification of need assessment approaches just mentioned, there have been some scales dealing with levels of functioning and perceptions of satisfaction with life that have been developed and used specifically with older populations. An exhaustive literature search dealing with scales of the functional assessment of the older American has been conducted by Lee London in the Chicago Regional Office, D.H.E.W. Twenty-three instruments were identified as having use in conducting functional assessments of older Americans.[3] London

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[1]Ibid., p. ii.

[2]Ibid., p. 9.

[3]Lee London, "Report on Literature and Interviews on Functional Assessment of Elderly," (unpublished, May, 1977).

critically reviewed these scales in terms of reliability and validity issues. These scales were primarily designed to measure ability of the elderly to perform daily living or personal care functions. No scale was found that was considered relevant to measure the educational needs of the young-olds as these needs might have applicability to the role of the university. The dearth of such scales did effect the particular approach to need assessment employed in this research.

The notion of need assessment has received considerable attention in many areas. But lack of methodological concensus reflects the state of the art. In spite of a growing literature, the establishment of conceptual frameworks or theoretical bases for need assessment remains relatively undeveloped. In part, the difficulty has been more a problem of preoccupation with methodological issues, i.e., identifying the population for study, designing the instrument, selecting a sample, data collection, tabulating and analyzing data, and interpreting results.[1]

The missing cornerstone to need assessment methodologies is the inability to arrive at consensus on what is a human need and how it is measured. The Research Group referred to this deficit:

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[1]U.S., Department of Health, Education and Welfare, Assessing Social Service Needs and Resources (Boos, Allen Public Administration Services, Inc., 30 June 1973), p. 10.

> Actually, few existing needs assessment techniques provide demonstrable, quantifiable statements of need. Most techniques rely heavily on surveying and determining perceived needs. While it can be argued that the only real need is one which people perceive, it cannot be realistically argued that all perceived needs are real. Therefore, most needs assessment techniques which survey statistically valid samples of the population derive valid assessments of people's desires, or wants.[1]

This section on need assessment research has served to summarize the growing importance of this area of research to planning and administration in the field of human services. Need assessment research is in an early state of development and there are many approaches to need assessment. The critical determinant for selection of a need assessment technique is the purpose to be served by the data. Need assessment tends to assume a deficit or deficiency in a given population. A need assessment approach based on intrinsic growth and development requirements is possible using Maslow's need theory.

The examination of alternative techniques for need assessment suggests that the target or service population survey is considered as one of the stronger tools. In the present study, primary reliance is placed on this form of survey, supported by a literature review and an extensive review of secondary sources of information such as census data.

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[1]U.S., Department of Health, Education and Welfare, Techiniques for Needs Assessment, p. 2.

Summary

There is a growing interest in older Americans and this is attested to by the 1971 White House Conference on Aging and its many areas of study. In studies of older people, many of the stereotypes of the older person are being examined. Of special concern to the present research is the educational capacity of the senior learner. In contrast to earlier studies, current research suggests that indeed the older American has the capacity for continued learning, continued growth. Universities have begun to grasp the implications of this learning potential and innovative programs aimed at senior learners have emerged. Insight into the potential of the adult learner comes at an opportune time as a down trend in enrollments of younger students is occurring.

The literature review offered the opportunity of examining possible theoretical underpinnings for the concept of human need and education. The processes of aging were deemed insufficient to support a comprehensive approach to lifelong learning because of a disengagement focus. The field of humanistic psychology did offer a theoretical premise through the work of Maslow which is based upon continued growth and self-actualization.

One of the problems faced by those interested in the work of Maslow has been the difficulty of operationalizing some of the key concepts, e.g., a hierarchy of prepotent

needs and external influences upon needs. The writings of Alderfer and McClusky were of help in this connection, particularly as it applies to developing a framework for assessing the educational needs of older Americans. The field of need assessment is an emerging one and one which has lacked theoretical support. Maslow and other writers who have built upon his theory of need provide a useful approach to assessing the educational needs of older Americans.

CHAPTER III

METHODOLOGY

The paucity of research in the area of older Americans who attend regular on-campus classes and the state of the art of need assessment research warrant a descriptive or formulative study of senior learners and the role of the university.[1] The methodology essential to conducting the study is presented in this chapter.

Introduction

The purpose of this study was to examine the educational needs of a group of senior learners. The research problems were to assess the perceived educational needs of selected senior learners and to identify the activities of the university in meeting these needs. The study was organized around four areas: the development of a profile of senior learners, the educational needs of those learners, institutional and personal barriers identified by the senior learner, and roles of the university as perceived by senior learners.

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[1]Claire Sellitz, Lawrence S. Wrightsman, and Stuart W. Cook, Research Methods in Social Relations, 3rd ed. (New York: Holt, Rinehart & Winston, 1976), p. 91.

Methodology was drawn from the field of need assessment research. Need assessments typically include: a conceptual framework, a profile of relevant demographic characteristics, profiles of domains of living (employment, education, health, personal adjustment, etc.), evidence of knowledge and utilization of services, identification of barriers to service utilization and an assessment of resources.[1] These elements represent the major content areas of a need assessment and are adapted in accordance with the conceptual approach employed and the use for which the research is intended. The various forms of data gathering employed in need assessment and the strengths and weaknesses of these forms were reviewed in Chapter II.

Conceptual Framework

This section identifies and explicates the four major propositions that were drawn from the work of Maslow and others and that served as a conceptual framework for the study.

> All humans are motivated by innate needs that are developmental in nature and which persist throughout life.[2]

Needs are linked to instinct--remnants which remain in the human species. These needs are hierarchially organized ranging from those associated with survival behaviors

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[1]U.S., Department of Health, Education and Welfare, Analysis and Synthesis of Needs Assessment Research in the Field of Human Services, pp. 7-13.

[2]Maslow, Motivation and Personality, 2nd ed., pp. 19-27.

to those directed toward maximizing human potential. Fundamental to this research is the position that needs serve as sources of motivation throughout life. Consistent with this developmental perspective, Maslow described self-actualization (a growth need) as being largely associated with maturity and as primarily confined to older people.[1] This initial proposition holds that the later years of a person's life have potential for achieving the highest level of personal development. Once the basic needs of older Americans are largely satisfied, further developmental needs will be experienced. Therefore, it follows that the university, through its educational programming could become an important means for helping many older Americans satisfy their developmental needs.

> The human is an integral part of a social environment that influences the extent and circumstances through which need satisfaction occurs.[2]

There is a confluence of biological and environmental influences that affect need satisfaction. If the individual is confronted with a favorable or nourishing environment, need satisfaction will progress toward realization of that person's innate potential. If the environment (physical and social) is largely unfavorable, the human potential will be diminished.[3] Any interruption in the social environment

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[1]For discussion, see Chapter, II, pp. 52-53.

[2]Maslow, Motivation and Personality, 2nd ed., p. 28.

[3]For discussion, see Chapter II, pp. 51-52.

creates a barrier to a condition of need satisfaction. Therefore, in a holistic view of human motivation it becomes necessary to identify barriers that could be treated as existing in the environment and whose removal would assist the natural process of need satisfaction. The stereotype of the older person as a non-learner serves as an example of a cultural barrier that would affect the process of need satisfaction among older people. The concept of barriers has extensive use in need assessment literature.

> Human needs are either basic or growth oriented.[1]

Basic needs are viewed as deficits which if left unfulfilled lead to a reduction of the human potential and related states of ill health (physical and mental). Growth needs are experienced only after minimal satisfaction of basic needs have been satisfied. These needs relate to the innate developmental forces that cause humans to seek to maximize their potentials. Although basic needs are hierarchial in nature, there is no hierarchy or prepotency relationship among elements that characterize growth needs.[2] Such a differentiation of human needs into basic or growth needs supports the selection of a need assessment approach that could focus on individuals engaging in growth-related

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[1]Maslow, Motivation and Personality, 2nd ed., pp. 35-48.

[2]For discussion, see Chapter II, pp. 46, 50-51.

behaviors, i.e., a target population of those older people attending a university.

> The humanistic and societal goal of education is ultimately the self-actualization of members of society.[1]

From the humanistic position, being fully human is for each individual to realize his or her individual developmental potential.[2] Learning is the principal means by which the individual acquires knowledge of self and the environment. Educational institutions can be viewed as offering a major means by which the individual acquires knowledge of self and the environment. Educational institutions can be viewed as offering a major means by and through which both basic and growth needs are satisfied. Basic public education provides a principal way of equipping individuals to assume key life roles. Through enactment of these key roles, individuals are able to satisfy many of their basic needs. For most people, this includes work for pay and for others entry into marriage or some arrangement by which the person is provided a means for satisfying basic needs. Like public education, the university also provides similar learning experiences that assist individuals in meeting basic as well as growth needs.

The four propositions established the major theoretical justification for the conceptual framework

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[1]Maslow, The Farther Reaches, pp. 162-72.

[2]For discussion, see Chapter II, pp. 27 and 50.

employed in this study. Support is identified in the propositions for the chief elements of the need assessment. The elements are: older Americans with basic needs that have largely been satisfied will experience growth needs in varying degrees and forms; various barriers exist that affect the satisfaction of growth needs; and institutions of higher education are a major resource through which the growth needs of older Americans (and other age groups as well) can be satisfied.

The next task of the study was designing a need assessment instrument consistent with this framework that would provide information needed to examine the study's research questions. In light of the Maslovian "growth needs" concepts, a survey instrument which would secure perceptual data from older people actually attending a university was deemed most appropriate. The position was taken that information on needs (motivation), barriers to need satisfaction and the role of the university in meeting these needs could be best obtained from members of the target population. In this instance, the target population was those older people actually attending an institution of higher education. The logic of utilizing this study group was also drawn from Maslow who developed his theory by studying people he viewed as self-actualized. He called this approach "growing-tip statistics."[1] This practice is drawn from a physical

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[1]Maslow, The Farther Reaches, p. 6.

analogy: it is at the growing tip of a plant that the greatest genetic action takes place.[1]

The decision to obtain data from older citizens who are attending the university is not to imply that all of these people are being motivated by what has been referred to as growth needs. Motivation is much too complicated and the state of theory development is such that no such claim could be made.[2] Rather, investigation of the perceptions of these people about their needs, barriers to need satisfaction and the role of the university seemed to be the most desirable approach considering the purposes of this research and logic of Maslow cited above.

Definitions

Terms have different meanings based upon some selective processes. The reasons for selection of these definitions grew out of the literature review and may be found in Chapter II. The following terms are defined so as to clarify their use in this research.

Human needs are understood in the present context to describe an innate source of behavior, the satisfaction of which is required for normal growth and development.

This definition is derived from Maslow. His construct identifies human needs as either basic or growth.

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[1] Ibid.

[2] For discussion, see Chapter II, p. 51.

Growth needs are predicated upon satisfaction of basic needs and these growth needs tend to be found among older or more mature individuals.

Educational needs are those behaviors directed toward satisfaction of basic and growth needs through organized learning experiences.

As used in this research, educational needs represent a particular way of operationalizing the concept of need. Most educational activity is directed toward passing on the values, knowledge, skills and related behaviors required in our society. Being so equipped is essential for individuals in meeting their basic needs. Educational activity can also be considered as a response to growth needs--the need for self-actualization--as well as basic needs.

In this research, educational needs of senior learners are categorized as being either process or content oriented. Process needs are viewed in a general sense as intrinsic, i.e., valuable in and of themselves. In contrast, content needs are instructive in nature and directed toward more utilitarian ends, i.e., the acquisition of specific knowledge and skills.

Barriers are obstacles that impede the process of need satisfaction.

It is considered useful in need assessment research to identify barriers to need satisfaction. The notion of

barriers becomes helpful in formulating the problem, establishing goals and considering alternative ways (plans) for reaching goals. In an educational application, Goodrow defines barriers as those "factors that act as constraints upon older adults thus preventing them from taking full advantage of learning opportunities available to them."[1]

In this research two forms of barriers were identified: personal and institutional.[2] Personal barriers were those related to the capacities and/or life circumstances of the individual. The person was viewed as having some degree of control over or responsibility for dealing with these barriers. Institutional barriers were those related to the actions, policies or conditions imposed on an individual by the university which impeded satisfaction of educational needs. A constraint only becomes a barrier when perceived as such by an individual.

Senior learners are those persons fifty-five and older who are seeking satisfaction of educational needs through organized learning experiences.

The definition is based upon the work of Neugarten and her concept of young-old. The young-olds according to

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[1]Bruce A. Goodrow, "Limiting Factors in Reducing Participation in Older Adult Learning Opportunities," Gerontologist 15, No. 5, Part I (Oct., 1975): 418-22.

[2]Roger P. Hiemstra, "Continuing Education for the Aged: A Survey of Needs and Interests of Older People," Adult Education XXII (Winter, 1972): 100-109.

Neugarten are age fifty-five to seventy-five and constitute 15 percent of the total population. They are relatively healthy, affluent, free from traditional responsibilities of work and family, are increasingly well educated, and politically active.

In the instance of this study, the young-olds were enrolled in The University of Oklahoma.

Roles of the University are the activities or cluster of activities performed by the university in regards to the pursuit of institutional goals.

The goals of an organization describe the functions which the institution is to perform. Function dictates structure. Therefore, goals may be transformed into roles or activities. In the present study, the roles or activities a university provides were considered along two dimensions, "outcome" and "process." Outcome activities are related to the objectives which higher education institutions seek to achieve, while process activities are internal in focus. Activities or roles in the second category are related to internal activities and processes such as creation of a learning climate and directing learning processes. Determination of what constitutes higher educational roles or activities was based on the goal scales work done by Peterson.[1] These activities are aimed at assisting

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[1]Richard E. Peterson, Goals for California Higher Education: A Survey of 116 Academic Communities (Princeton, N.J. Educational Testing Service, December, 1972), p. 8.

individuals in satisfying developmental or growth needs. Therefore, the university was perceived as being a major community resource available for older people to satisfy growth needs.

Geographically accessible refers to those senior learners who according to their permanent address reside in a physical proximity which permits regular use of the university.

The university was considered a community resource and as such it should be geographically (physically) accessible to senior learners. For purposes of this research, "geographically accessible" senior learners included students residing in those Oklahoma counties contiguous to and including Cleveland County in which The University of Oklahoma is located. In addition to Cleveland County, these counties include Pottawatomie, Oklahoma, Canadian, Grady and McClain.

Study Sample

The study was limited to senior learners age fifty-five and older who were enrolled for credit in courses offered at the Norman Campus of The University of Oklahoma and who were geographically accessible. All of the study group attended The University of Oklahoma for at least one semester between the Fall, 1975 and Spring, 1977 semesters. Only the six Fall-Spring semesters were surveyed; no summer semesters were utilized. Of the total senior learner population (148 students), seventy-five were determined to be

geographically accessible, i.e., residing in either Cleveland County or a contiguous county. Selection of subjects was accomplished in Summer, 1977. Files from the Office of Admissions and Records at The University of Oklahoma indicated that forty-nine individuals age fifty-five and over attended the University in Fall or Spring semesters, 1975-76 and that ninety-four different senior learners attended the Fall or Spring semesters, 1976-77. The total number of possible subjects was 148. Of these, thirty-six were geographically inaccessible, three were known deceased, seven were not age fifty-five or over, six did not have a current address or telephone number in available records, and eight were not available at the time. Of the remaining eighty-eight, thirteen individuals could not be located for data gathering purposes. The remaining seventy-five all indicated an interest in participating in the study.

Because some females in the study group had been previously surveyed during the preceding semester by The University of Oklahoma's Office of the Provost, no extensive effort was made to involve resistive or strongly hesitant subjects since the type of information needed for this research required full cooperation and at least forty-five minutes of time. Of the seventy-five subjects contacted, sixty-six were willing to fully cooperate, and comprise the data source of the study.

Instrumentation

The interview schedule was designed to gather information needed to examine the four aspects of the study question. Therefore the instrument was comprised of four parts: demographic information, educational needs, barriers, and roles of the university. (See Appendix A.) Interviewing was selected over other data collection methods because high response and completion rates are more likely to occur with interviews than questionnaires and because "Many people are willing and able to cooperate in a study when all they have to do is talk."[1] In addition, a personal contact was considered most appropriate for securing certain qualitative information from respondents, i.e., elaborations on responses.

Profile

In order to develop a profile of the senior learner, basic demographic information was sought in Part I of the schedule. This information consisted of: age, sex, race, marital status, employment status, retirement status, occupation, years of school completed, college or university granting most recent degree, major field of study, year in which last college or university course was taken, year in which last attended a workshop or conference on a college

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[1]Selltiz, Wrightsman, and Cook, Research Methods in Social Relations, pp. 296-98.

campus, how many functions (other than educational) attended on university campus during the past twelve months, household income, parents attended college, spouse attended college, number of children, number of children who attended college, semesters attending The University of Oklahoma, and courses taken. These items were developed from the literature review regarding senior learners and have received extensive attention from Hiemstra and Gould and Cross.[1] In instances where data could be compared to census data, U.S. census categories were used (e.g., occupational categories) or condensed (e.g., income levels).

Educational Needs

The educational needs section of the schedule was developed from the writings of Maslow;[2] the work of McClusky, since he specifically addressed needs of older Americans and their relevance to education;[3] and Peterson's work in the area of new roles for adult education.[4] From the literature, an inventory of twenty-two educational needs was developed (see Appendix A). Each of the items appeared in either McClusky or Peterson and was also documented in

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[1]Hiemstra, "Continuing Education for the Aged,": 100-09 and Gould and Cross, Explorations in Non-Traditional Studies, pp. 39-63.

[2]Maslow, The Farther Reaches, pp. 162-188.

[3]McClusky, "Education," pp. 1-5.

[4]David A. Peterson, "The Role of Gerontology in Adult Education," in Learning for Aging, pp. 41-60.

research reports by one of the following: Hendrickson and Barnes, Hiemstra and Hixson.[1]

After the inventory was developed, the need items were further identified as process or content needs. The notion of content was derived from Maslow's associative learning which he described as "means" or "instructive." And the notion of process needs was derived from his concept of intrinsic learning.[2]

As a result, out of the list of twenty-two educational need items, there were thirteen process needs and nine content needs. Because the process needs (intrinsic learning) are a potential which is represented in all people, regardless of age, they are not exclusively senior age-related.[3] Of the nine content or instructive items, six were senior age-related and three were not. Hiemstra's work was especially useful in the development of needs which are instrumental in meeting changes which occur in the older years.

Subjects were asked to rank the importance of each educational need item on an itemized rating scale of one to

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[1]Andrew Hendrickson and Robert F. Barnes, "Educational Needs of Older People," Adult Leadership XVI (May, 1967): 2-4; Hiemstra, "Continuing Education for the Aged": 100-109; and Leroy E. Hixson, "Non-Threatening Education for Older Adults," Adult Learning XVIII (September, 1969): 84-5.

[2]Maslow, The Farther Reaches, p. 163.

[3]Stanley Grabowski and W. Dean Mason, (ed.), Learning for Aging, pp. 324-55.

five ranging from, "of no importance or not applicable" to "of extremely high importance." An open-ended question allowed the subjects to add items.

Barriers

Studies regarding factors which inhibit or restrict participation of older Americans in higher education programs were used to identify barriers. These barriers constituted part three of the instrument. The notion of barriers was employed by Hiemstra. His research examined the notion of personal barriers as descriptors of factors which limit participation because they are perceived by learners as blocks to meeting needs.[1] His research served as a primary source for development of an inventory of barriers. A barrier or constraint was utilized in the present research if it appeared at least twice in research reported by the following: Hiemstra, Goodrow and Hixson.[2] A list of fourteen barriers emerged.

These barriers were listed and respondents were asked to check "yes" or "no" for the presence or existence in their recent educational experience of each of the fourteen barriers (8 institutional and 6 personal). Removal or reduction of barriers or blocks serve to insure that

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[1]Hiemstra, "Continuing Education for the Aged": 100-09.

[2]Ibid.; Goodrow, "Limiting Factors": 418-22; and Hixon, "Non-threatening Education for Older Adults": 84-5.

programmatic responses to identified needs might more adequately insure successful participation.[1]

University Roles

The university roles section of the instrument was derived from the Institutional Goals Inventory and its initial use in a major goals study, the California Goals Study.[2] For purposes of the study, the IGI goal scales were used to define areas of activities in which the university engages. Part four of the instrument contains a list of statements for the twenty goal areas from the IGI, Form I. Consistent with the educational needs section of the interview schedule, the goal areas included two general categories, outcome and process.

Subjects were asked to attach a level of importance to each activity or role area for both the total population and for their own age group, those age fifty-five and over. Therefore, each role or activity area had a set of two responses. Subjects were asked to evaluate the role in terms of the university and senior learners and of the university and the total population so that senior learners' perceptions of the role of the university for each of the two groups could be compared.

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[1]H. Lee Jacobs, W. Dean Mason, and Earl Kauffman, "Learning Characteristics and Abilities of Older Adults," in Education for Aging: A Review of Recent Literature, pp. 13-15; and Goodrow, "Limiting Factors": 418-22.

[2]Peterson, Goals for California, p. 27.

Reliability and Validity

Problems of reliability and validity of the procedure were recognized. Warwick and Lininger suggested that in descriptive research, the two functions of reliability and validity may be translated as relevance and accuracy when designing questionnaires. (Interview schedules are considered questionnaires by these authors.)

> To ensure relevance, the researcher must be clear about the exact kinds of data required in the study. Specifically, he or she should have an explicit rationale for each item in the questionnaire covering not only why the question will be asked but what will be done with the information . . . Accuracy is enhanced when the wording and sequence of the questions are designed to motivate the respondent and to facilitate recall. Cooperation will be highest and distortion lowest when the questionnaire is interesting and when it avoids items which are difficult to answer, time-consuming, embarrassing, or personally threatening.[1]

Several measures were taken to ensure relevance and accuracy: a part of the instrument was derived from a nationally developed and tested instrument; interviewers were trained so as to reflect concern for the subject's dignity and respect for his or her privacy; pre-testing of the schedule was done in order to avoid language difficulties when possible and to sequence the items in such a way as to gradually engage the respondent on a more abstract level; open-ended questions were asked in order to provide the

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[1]Donald R. Warwick and Charles A. Lininger, The Sample Survey: Theory and Practice (New York: McGraw-Hill Book Company, 1975), p. 127.

subject additional opportunity to expand or "temper" responses; and subjects were given options of answering "no opinion" or "no response" with stated assurances from interviewers that this was a legitimate response.

> In uniquely developed instruments, the validity of the instrument is grounded in the literature review. The issue of reliability is handled with field testing, and also when interviewing methods are employed, with interviewer training.[1]

Data Gathering

Collection of data involved three processes which constituted three separate sequences of activities: selection and training of interviewers, field testing of interview schedule, and data collection.

Selection and Training of Interviewers

Seven interviewers were selected and prepared to participate in the study. All interviewers were undergraduate seniors majoring in an accredited undergraduate social work program. They were female and their ages ranged from twenty-three to forty-one. Only female interviewers were selected because two-thirds of the respondents were women and because most of the data were secured in the homes of respondents. Due to safety concerns on the part of older Americans, it was felt that women interviewers would be more acceptable and less threatening to subjects.

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[1]Selltiz, Wrightsman, and Cook, Research Methods in Social Relations, pp. 160-97.

Interviewers received basic interview skills training in an undergraduate academic course, "Social Work Practice I" (SWk 5113) taught by the researcher during Spring, 1977. All interviewers were members of the same class, attended all classes, and demonstrated mastery of interviewing skills. Uniform performance-levels were determined on the basis of the interviewers' abilities as indicated by performance evaluation.

Basic interview skills as taught in the course included: purposes and functions of interviews, constructing an interview around purpose, listening skills (attending skills, minimal encourages to talk, paraphrasing, reflection of feelings and empathic responding), and probing skills. The interviewer training sessions were focused on understanding how to administer the interview schedule and the mechanics of reporting. The primary foci were standardizing the interview and minimizing interview bias.[1] In the training meetings, interviewers spent time learning about the purpose of the study, the subjects they would be interviewing in the field test and the study, "home interviews" and "initial contact by telephone," how to administer the instrument, and how to record the results on a Fortran sheet to facilitate data analysis.

After the training meetings, all interviewers participated in a field test. Interviewers understood the

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[1]Selltiz, Wrightsman, and Cook, Research Methods in Social Relations, pp. 309 and 570.

purpose of the field test to include polishing their skills as well as learning instructions regarding logging times for each interview, allocation of space in the room for interviewing privacy, and critical incident reporting. Critical incident reporting consisted of recording information regarding special concerns respondents reported about any items on the instrument.

Following the field test, interviewers were given the opportunity to withdraw from further participation. One interviewer was unable to continue because of employment conflicts. At this time a contract was established with each of the six interviewers.

Interviewers received their assigned subjects and began conducting their interviews. The interview schedules were returned to the researcher upon completion so that concerns and questions could be resolved early in the process. Returned schedules were examined by the researcher for completeness, comprehensibility, and consistency.[1] It should be noted that during the initial telephone contact the interviewers were asked to explain the purposes of the interview, the importance of interviewing every subject, and to ask the subject when and where they might meet. Although the researcher seeks to obtain the highest level of response possible to strengthen the findings of the study,

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[1]Ibid., p. 108.

interviewers were told not to persist if the subject clearly indicated an unwillingness to participate.[1]

Interviewer bias was carefully examined. It was examined under the assumption that there was no difference among interviewers. Analysis of variance was used for analysis since the concern was for both "between groups" variance and "within groups" variance. The assumptions underlying the use of the analysis of variance technique were considered met, i.e., individuals in subgroups represented normally distributed populations, the samples comprising the groups were independent, and the variance of the subgroups was homogeneous (Bartlett's test was used).[2] There was some possibility of interviewer bias because respondents' responses for interviewer #5 were regularly the highest in the range of responses and respondents' responses for interviewer #1 were lowest. Since interviewer #5 was the researcher who developed the instrument, there was concern about interviewer bias. These results led the researcher to ask if interviewers significantly affected the results. A two-tailed t-test was administered since the researcher did not have an explicit hypothesis concerning an expected direction of the coefficient.[3] Also, "the t-test is said to be robust;

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[1] Ibid., p. 570.

[2] N. M. Downie and R. W. Heath, Basic Statistical Methods (New York: Harper and Row, Publishers, 1970) p. 217.

[3] Norman H. Nie, C. Hadlai Hull, Jean G. Jenkins, Karin Steinbrenner, and Dale H. Brent, Statistical Package for the Social Sciences (New York: McGraw-Hill Book, Co., 1975) p. 283.

that is, it is a test relatively unaffected by violation of its underlying assumptions."[1] The two-tailed t-test demonstrated that interviewer bias was minimal and did not adversely affect data collection. The data from the t-test are shown in Appendix B; Table 22. Results from the item sets in Part IV: Roles of the University (the part of the interview requiring the most interpretation according to field test subjects and interviewers) showed significance at the 0.5 level for only one item out of twenty, which could be expected. The more strict and conservative Scheffé was administered with the same results. The Scheffé "is appropriate for examination of all possible linear combinations of group means, not just pairwise comparisons."[2] According to measures utilized, the assumption that no difference existed between interviewers was substantiated.

Field Testing of Interview Schedule

The interview schedule was field tested with selected subjects from the Senior Adult Program at Oscar Rose Junior College, Midwest City, Oklahoma. This program is well-established and has a substantial population of senior learners. Subjects were volunteers who had been invited by the program's director to participate in a survey

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[1]Downie and Heath, Basic Statistical Methods, p. 183.

[2]Nie, et al., Statistical Package for the Social Services, p. 428.

of educational needs of senior learners. The interviewing took place on one day with all interviewers participating. Subjects were requested by the interviewers to examine the interview schedule with care regarding its purpose and general appropriateness, language, incomplete categories of response, and additional categories of need. Response times were logged to determine the length of interviews. After the interviews were completed, a group meeting of all interviewers was held and information from each interviewer was discussed. No substantive areas were changed or added but some response categories were added (i.e., "minister" was added to the occupational list and "other" was added to marital status list). Interviewers reported that subjects displayed a general satisfaction in terms of the instrument's face validity as recorded following the administration of the instrument.[1] Interviewers discussed difficulty in controlling for bias by not interpreting the item's content or meaning in the section on the university's role. Also, time was spent discussing respondent resistance. To encourage respondent confidence, interviewers were instructed to handle resistance in as matter-of-fact a manner as possible. In explaining the purpose of the study, interviewers were instructed to assure subjects that information was anonymous and to add that "no response" was an acceptable response.

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[1]Selltiz, Wrightsman, and Cook, Research Methods in Social Relations, p. 577.

Interviewers were instructed to record observed critical incidents on the reverse side of the interview schedule.

The field test subjects differed from the study group respondents in that subjects were introduced to the research by someone they knew and presumably trusted, i.e., their educational program director; the field test subjects volunteered rather than being contacted by mail and then telephoned; the interviews were held at the institution rather than at home; the field test subjects may have participated in previous testing procedures according to the program's director and may have tended to be understanding of the process; and the field test respondents represented a junior college student group, not a university student group. The respondents were highly cooperative and attentive.

Data Collection

Letters explaining the study and giving the name of the interviewer who would be calling for an appointment were sent to geographically accessible senior learners who were enrolled in The University of Oklahoma during Fall and Spring, 1975-76 and Fall and Spring, 1976-77 (see Appendix A). Names and addresses were provided by the Office of Admissions and Records, The University of Oklahoma.

The subjects were divided into six groups based upon location of their residence: Norman-western Oklahoma City; Cleveland County; Pottawatomie County-Norman-Midwest City-Del City; Canadian County-Grady County-western Norman;

Norman; and eastern Oklahoma County. Five interviewers were given approximately twenty subjects each, with the researcher being assigned ten subjects. Respondents were asked to indicate if they knew the interviewers. Only eight subjects knew the interviewer. All data were collected during one interview.

Seven days after the letters were mailed, interviewers made attempts to contact all subjects and schedule appointments. For those subjects who were difficult to locate, interviewers used the two weeks during which they were interviewing to continue trying to contact them. At the end of two weeks, all data were turned in to the researcher.

Data Analysis

After interviews were completed, data were transferred by interviewers to Fortran sheets. Each interviewer and the researcher checked the data transfer as a means of verification. Computer cards were punched and machine verified. Also, the interview schedule indicated both the computer card design and the instrument parts or sections to be analyzed. Each item number was coded for both a Fortran sheet and key punch card, i.e., card one, columns one through thirty-eight, were for demographic data; card one, columns forty-one through sixty-four, were for educational needs of senior learners; card one, columns sixty-five through eighty, were for institutional and

personal barriers; and card two, columns one through forty-three, were for roles of the university.

Since this research was essentially descriptive in nature, most of the findings are summarized in frequency counts and percentages. Tests of statistical significance were applied to the data where applicable as were measures of association. For purposes of this study, an alpha level of .01 was selected as necessary for statistical significance.

Since "what is currently undefined (unknown) must become known and accurately defined"[1] through the need assessment process, the starting point for analysis was an examination of the general characteristics of the senior learners who were currently using The University of Oklahoma. A description or profile of the senior learner was developed using frequency counts because of the categorical nature of the data.[2] Additionally, selected demographic variables (sex, working on a degree, former occupation, field of study, and employment status) were cross tabulated with educational needs and roles of the university and a measure of association computed. A general mode of cross tabulations was done because the variables were alphanumeric and numeric.[3] From

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[1]English and Kaufman, Needs Assessment, p. 3.

[2]Fred N. Kerlinger, Foundations of Behavioral Research, (New York: Holt, Rinehart and Winston, Inc., 1973), pp. 138-40.

[3]Nie, et al., Statistical Package for the Social Sciences, pp. 223-24.

these joint frequency distribution tables, chi square analysis determined if systematic relationships existed between demographic and educational need variables. It was used since frequency data were to be analyzed, the data were discrete (counting of people) and the measures were independent of each other (i.e., the assignment of one object to a cell in no way affects the assignment of any other object to that cell or to any other cell).[1] In the event that cell frequencies were too small, analysis was terminated.

Levels of importance on a scale of one to five for each of the twenty-two educational need items were tabulated; process and content items were separated; and rankings were obtained.[2] Frequency distribution analysis was again employed to determine central points of concentration.

The presence or absence of institutional or personal barriers which inhibit participation at The University of Oklahoma was indicated by "yes" or "no" responses. Numbers and percentages were used to analyze these data.

Perceptions of the activities or roles of the university for both the senior learner and the total population were each ranked on a rating scale of one to five. The reports were analyzed by frequency distribution and correlated. Median was used to describe the data because it is less affected by extreme scores. Measures of association

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[1] Ibid.

[2] Downie and Health, Basic Statistical Methods, p. 19.

were computed on roles of the university to determine the degree of association for the levels of import between the total population and with those age fifty-five and older. Coefficient of correlation was used to measure the degree of relationship because neither variable was considered to be independent and because there was a joint probability distribution of both variables. It was deemed the appropriate measure since a correlation coefficient not only summarizes the strength of relationship between a pair of variables, but also provides an easy means for comparing the strength of relationship between one pair of variables and a different pair.[1] Thus, a level of import among the educational roles could be established. The measures of association utilized were Pearson product-moment, Spearman Rho and Kendall. The primary difference between r_s and γ is that γ handles tied Ranks in a more explicit, meaningful way.[2] However, both r_s and γ have built-in procedures for handling tied ranks and there is no definite guide for choosing between the two.[3]

Limitations

There were three areas of limitations to the study: the nature and development of need assessment research,

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[1]Nie, et al., Statistical Package for the Social Sciences, pp. 288-90.

[2]Ibid.

[3]Ibid.

methodological issues, and issues regarding activity theory. The difficulties associated with need assessment research were discussed in Chapter II but the fundamental problem was that no consensus exists on what constitutes a need. Therefore, the state of the art of need assessment is confusing and conflictual. As a consequence, this research assumed an exploratory and descriptive mode.

Although in an early stage of development, there are a number of approaches to need assessment. Aside from use of archival sources, a target population survey was employed as the primary approach to need assessment. The need assessment literature encourages the use of several different techniques to help overcome some of the reliability and validity problems associated with the use of any single technique.[1] Since one technique was basically employed, considerable caution must be exercised in use of findings from this study.

In terms of methodological issues, the most basic is whether the instrumentation answers the research problem. Since the instrument developed for the present research was derived from the literature, this will be addressed first. The nature of the literature was such that there were few empirical studies upon which to rely. Further, there was little in the literature to do with educational needs of older Americans and the University. Where the literature

[1]U.S., Department of Health, Education and Welfare, Techniques for Needs Assessment, p. ii.

is sparse concerning the older American as student, it is abundant in gerontological studies. It would appear that much is being done by higher education to prepare people for work and/or study in the field of gerontology. Unfortunately, this was of little help in this research.

In terms of developing the study, the study questions were clear and in keeping with the exploratory nature of the research. The subjects represented all of the senior learners that met criteria for inclusion. But, the small number of senior learners meeting this criteria posed a problem for analysis. Additional comparisons could have been made had more subjects been available. Of particular interest was the kinds of courses subjects were selecting as an outlet for their educational pursuits. But, there were too few subjects to investigate this dimension of need.

There are problems with attempting to generalize from these senior learners to seniors attending other universities. Such generalizations are not possible from these data but no such capability was intended. Any generalizations made to other senior learners would have to be considered speculative and viewed as questions for additional research; such was the intention of this need assessment.

The need assessment approach in the present study relied on use of perceptual data to get at the notion of need. There are important limitations in use of such data. In this instance however, subjects were also attending a

university and thus there was a behavioral referent of this need. In other words, the approach sought to identify the factors, the motivational referents, as to why these senior learners were engaging in educational activities. Similarly, no testing was conducted to determine whether or not the need statements used actually met the standards of a definition of "need." While the statements lacked empirical testing as to their validity, they were derived from the literature and were judged to possess face validity.

Other limitation concerns regarding the study sample were: interviewing was done during the summer months when some subjects may be unavailable because of vacations (which could exclude certain employed groups or individuals from the study); subjects had already been a part of a study by the Office of the Provost regarding students considered to be older than the typical student; and data source problems may have occurred such as an incomplete listing of senior learners (less than one percent of all students fail to give birthdates, some may give it incorrectly, and so on).

The final area of limitations of the study has to do with the underlying assumption regarding needs of older Americans; that is, do older Americans seek to remain active, engaged? or is a disengagement focus more appropriate? Activity theory versus disengagement theory is a relatively recent phenomena. It may be argued that this is more a value position than a theoretical issue. But the

theoretical implications are profound. If disengagement theory is employed as a foundation, educational needs of senior learners will be perceived as age-related processes and the age-related content areas would be directed towards a "turning inward, of concern for health, of consciously reduced life space."[1] An activity theory focused approach would place attention on the lifelong process of human development and would emphasize education as an intervention mechanism to maximize functioning. Although activity theory is not yet completely developed, its proponents are strong and are represented by leaders in the field of gerontology such as Neugarten and Havighurst.

At the outset, note was made of the developmental nature of need assessment research. It is nonexistent as applied to the senior learner and the role of the university. This study should be viewed within this developmental context. While the limitations are substantial, it is hoped that this study served its exploratory function and will be useful for subsequent research into this important area of human concern.

Summary

This chapter has served to summarize the methodology employed in the study. Central to the research was a conceptual framework derived from the work of Maslow

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[1]Peterson, "Life-Span Education and Gerontology": 441.

and others who have used need concepts for describing and analyzing human behavior. A set of definitions was derived from this conceptual framework and was employed in development of an interview schedule used for data collection purposes.

The interview schedule contained four major sections which were organized around the central concerns of the study. Data collection through face to face interviews was utilized. All subjects attended The University of Oklahoma during the regular academic years (Fall and Spring semesters) of 1975-76 and/or 1976-77 and were enrolled for credit in the University's traditional campus program.

CHAPTER IV

PRESENTATION AND ANALYSIS OF DATA

Presentation and analysis of data from the need assessment study of senior learners are organized around the four study areas: a profile of the senior learner, educational needs of selected senior learners, barriers which reduce or inhibit senior learners from satisfying their educational needs, and activities the university may provide for senior learners and for the general population as perceived by senior learners.

Profile

The initial area of inquiry in studying the educational needs of senior learners was to identify educationally relevant characteristics of this group of selected senior learners.

The profile of study participants was produced by collecting data on twenty-three points of information. Each of the information points was computer tabulated. In the paragraphs that follow, selected characteristics are reviewed and a general profile presented.

Age

Table III displays the age distribution of senior learners.

TABLE III

AGE DISTRIBUTION OF SELECTED SENIOR LEARNERS BY NUMBER AND PERCENT

AGE	NUMBER	PERCENT OF TOTAL	CUM PERCENT
55	11	17.5	17.5
56	8	12.7	30.2
57	11	17.5	47.6
58	11	17.5	65.1
59	6	9.5	74.6
60	3	4.8	79.4
61	4	6.3	85.7
62	1	1.6	87.3
63	4	6.3	93.7
65	2	3.2	96.8
67	1	1.6	98.4
70	1	1.6	100.0
N.R.	3	N.R.	
TOTAL	66	100.0	

The age range of senior learners was fifteen years, or from age fifty-five to seventy, with 74.6 percent of the subjects being under the age of sixty. The mean age of all respondents was 58.3 years. The data show that these selected senior learners were concentrated on the "young" side of

the age range. According to Neugarten's classification, all of the senior learners interviewed were "young-olds," ages fifty-five to seventy-five.

Sex

The distribution of respondents by sex is summarized in Table IV.

TABLE IV

DISTRIBUTION BY SEX OF SELECTED SENIOR LEARNERS

CATEGORY	NUMBER	PERCENT OF TOTAL
MALE	25	37.9
FEMALE	41	62.1
TOTAL	66	100.0

Approximately two out of three enrollees were women. The preponderence of women in the study is evident.

Race

Racial information indicated that only three respondents were black. No other racial backgrounds were reported.

Marital Status

Fifty-two of the subjects or 78.8 percent were married. There were eight widows or widowers in the study

group, or 12.1 percent. The two groupings constitute 90.9 percent of the subjects (60 subjects). The other six subjects indicated an ambiguous marital situation.

Employment Status

Thirty-three subjects (50 percent) were fully employed at the time of the study. There were three identified homemakers in the group.

Number of Years Since Fully-Retired

Because thirty-six subjects were either fully employed or were full-time homemakers (54.5 percent), this information was not applicable to over one-half of the subjects. Of the remaining thirty subjects, sixteen (24.6 percent of the total population) had been retired less than four years.

Occupation

Data regarding the major, paid or salaried occupational backgrounds of the senior learners are reported in Table V. Over sixty (62.9) percent of the respondents classified themselves as having a professional or technical occupation. Six women categorized themselves as "homemaker" (9.7 percent of the total population).

One-half of the subjects (33) were still fully employed. Fourteen or 21.2 percent were fully retired and the remaining nineteen persons were in various states of partial retirement.

TABLE V

MAJOR, SALARIED OCCUPATIONAL BACKGROUNDS OF SELECTED SENIOR LEARNERS BY NUMBER AND PERCENT

OCCUPATION	NUMBER	PERCENT OF TOTAL
PROF-TECHNICAL	39	62.9
HOMEMAKER	6	9.7
ADMINISTRATIVE	5	8.1
CLERICAL, SALES	4	6.5
CRAFTSMAN, FOREMAN	2	3.2
DRIVER, FACTORY	1	1.6
TEACHER	5	8.1
N.R.	4	N.R.
TOTAL	66	100.0

TABLE VI

CURRENT HOUSEHOLD INCOME OF SENIOR LEARNERS BY NUMBER AND PERCENT

INCOME CATEGORY	NUMBER	PERCENT OF TOTAL	CUM PERCENT
UNDER $5,999	9	15.3	15.3
$6,000-11,999	6	10.2	25.4
$12,000-24,999	30	50.8	76.3
$25,000+	14	23.7	100.0
N.R.	7	N.R.	
TOTAL	66	100.0	

Income

Data regarding family (household) income are displayed in Table VI (see previous page). The majority of respondents appear to be financially comfortable. Of the fifty-nine respondents answering this question, forty-four had incomes of $12,000 per year or more. Fourteen individuals had family incomes of $25,000 per year or more.

Educational Attainment

Educational attainment levels of senior learners was of central import to this profile. These data are reported in Table VII.

TABLE VII

YEARS OF SCHOOLING COMPLETED BY SENIOR LEARNERS BY NUMBER AND PERCENT

HIGHEST LEVEL OF SCHOOL COMPLETED	NUMBER	PERCENT OF TOTAL	CUM PERCENT
GRADES 1-12	0	0	0
GED	1	1.5	1.5
COLLEGE 1 YEAR	2	3.0	4.5
COLLEGE 2 YEARS	0	0	0
A.A. DEGREE	0	0	0
COLLEGE 3 YEARS	14	21.2	25.8
BA BS OR 4 YEARS	7	10.6	36.4
TEACHING CERT.	1	1.5	37.9
GRAD CERT.	3	4.5	42.4
1 YEAR GRAD.	8	12.1	54.5
2 YEAR GRAD. MA	11	16.7	71.2
3 YEAR GRAD.	9	13.6	84.8
4 YEAR +	7	10.6	95.5
PH.D	3	4.5	100.0
TOTAL	66	100.0	

The modal response was three years of college (fourteen subjects or 21.2 percent). The high level of educational attainment among the subject group was evident. Forty-two persons or 63.5 percent of all subjects had reached a post-baccalaureate level with thirty persons (45.5 percent) having two or more years of graduate studies.

Data were also gathered on educational attainment levels of other family members (see Tables 15, 16, 18, and 19 in Appendix B). The results indicate involvement of family members in higher education. Twenty-eight respondents or 42.4 percent had at least one parent who attended college. Thirty-six subjects reported neither parent had attended college. Forty-two respondents (63.0 percent) indicated that their spouses had attended college.

Inquiry was also made regarding the university or college from which the subjects received their most recent degree. Forty-nine had received degrees. Of that number, thirty-two received their last degree from The University of Oklahoma.

Attendance at University Functions

Table VIII provides data on respondents' attendance at non-educational functions held on a university or college campus in the past year. Of the total study group, 75.4 percent attended functions on campus. Of those who attended functions, 60 percent reported having attended four or more events during the year.

TABLE VIII

SENIOR LEARNERS' ATTENDANCE AT NON-EDUCATIONAL FUNCTIONS ON COLLEGE OR UNIVERSITY CAMPUS IN LAST 12 MONTHS BY NUMBER AND PERCENT

CATEGORY	NUMBER	PERCENT OF TOTAL
NONE	16	24.6
1-3	10	15.4
4-6	16	24.6
7 OR MORE	23	35.4
N.R.	1	N.R.
TOTAL	66	100.0

Attendance at The University of Oklahoma

Enrollment information suggests that respondents enroll over a period of time as opposed to taking an occasional course. The data is reported in Table IX.

TABLE IX

SENIOR LEARNERS' SEMESTER ENROLLMENTS AT THE UNIVERSITY OF OKLAHOMA FROM FALL, 1975 TO SPRING, 1977 BY NUMBER AND PERCENT

SEMESTER CATEGORY	NUMBER ENROLLED	PERCENT OF TOTAL
Fall, 1975	46	69.7
Spring, 1976	40	60.6
Fall, 1976	43	65.2
Spring, 1977	30	45.5

For the six semesters examined, number of enrollments for the study group is high except for Spring, 1977.

Information regarding the major fields of study in which senior learners were enrolled is displayed in Table X.

TABLE X

ACADEMIC UNIT OF STUDY FOR SENIOR LEARNERS BY NUMBER AND PERCENT

CATEGORY	NUMBER	PERCENT OF TOTAL
ARTS AND SCIENCES	21	31.8
BUSINESS	7	10.6
EDUCATION	12	18.5
ENGINEERING	2	3.0
FINE ARTS	5	7.6
NO MAJOR FIELD OF STUDY	1	1.5
OTHER	11	16.7
OTHER PROF. (HSC)	7	10.6
TOTAL	66	100.0

The College of Arts and Sciences had the largest number of senior learner students (31.8 percent). This college is the largest of the several colleges contained within The University of Oklahoma. The College of Education had the second largest enrollment (18.5 percent).

Degree or Non-Degree Oriented

The study group was evenly divided between those working on degrees and those not currently working on degrees. Two subjects were undecided. Since thirty-two of the sixty-six subjects were not working on degrees, would they enroll again because another need was being met? Five subjects indicated they were undecided about future enrollment. Of the remaining sixty-one subjects, fifty-two (78 percent of the total study group) reported they would enroll again. At least three of the nine subjects who did not plan to enroll reported they had completed their current educational experience and graduated.

Summary

The senior learners who comprised the study population can be characterized as follows: they are predominately "young-olds," women, married, have a professionally or technically oriented occupational background, are financially secure, and likely to be working at least part-time. Central to this study was the finding that students have a strong educational background and a close and continuing association with the university in both its academic and non-academic activities.

Educational Needs

In approaching the problem of assessing the needs of senior learners at the university, another area of inquiry

fundamental to the problem under study was the perceived educational needs of selected senior learners.

The schedule contained twenty-two "educational need" statements. Respondents were asked to assign a value or weight to the personal importance of that need. The weights ranged from 1, "of no importance" to 5, "of extremely high importance." The ranking procedure provided the means for securing perceptual data from the selected senior learners bearing on their motivation for attending the university, i.e., data reflective of their needs.

The educational need statements were divided into process items (13 items) and content items (9 items). Table XI displays the ranking by medians of the educational need responses. The mean and modal responses and variances are shown. With two exceptions, process items ranked higher than content items. The two content items in the top thirteen rankings were: "Re-training or new training for entrance into a new employment or post-retirement profession" (ranking #10) and "Self awareness, self growth, and values clarification" (ranking #9). The two process items that did not rank in the upper thirteen items were: "Contact within an open and stimulating environment with other Older Americans" (ranking #16) and "Accessibility and opportunity to attend and/or participate in recreational and leisure time facilities available on campus" (ranking #18). In one instance, a similar educational need was represented in both

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TABLE V:

RANKING BY MEDIAN SCORES OF PROCESS AND CONTENT ITEMS IN PART II:
EDUCATIONAL NEEDS OF "SENIOR LEARNERS AND THE UNIVERSITY",
ACCOMPANIED BY MEDIAN, MEAN AND MODE SCORES AND VARIANCE.

PROCESS RANKING				MEDIAN	MEAN	MODE	VARIANCE
Item	Item #	Rank	Combined Rank*				
Lifelong learning	43	1	(1)	4.429	4.200	5.000	.944
Interact with eminent people	44	2	(2)	4.354	4.200	5.000	.850
Involvement of time	38	3	(3)	4.341	4.123	5.000	1.047
Interesting subjects, strong interest	42	4	(4)	4.069	3.954	4.000	.951
Contact with multi-generational groups	37	5	(5)	4.037	3.892	4.000	1.066
Helping others	40	6	(6)	3.941	3.677	5.000	1.785
Interesting subjects, no background	41	7	(7)	3.906	3.758	4.000	1.017
Self expression	48	8	(8)	3.857	3.600	4.000	1.681
To give and receive attention	39	9	(11)	3.389	3.288	3.000	1.624
Attend and participate in artistic endeavors	46	10	(12)	3.194	3.138	3.000	1.746
Participate in special campus programs	45	11	(13)	3.042	3.015	4.000	2.047
Contact with senior learners	36	12	(16)	2.815	2.769	3.000	1.243
Recreational and leisure activities	47	13	(18)	2.684	2.615	1.000	1.928
CONTENT RANKING							
Item	Item #	Rank	Combined Rank*				
Self awareness	56	1	(9)	3.825	3.446	4.000	2.157
Training for new occupation	49 @	2	(10)	3.789	3.338	4.000	2.415
Community involvement	55	3	(14)	2.964	2.892	4.000	1.910
Retirement planning	50 @	4	(15)	2.893	2.785	1.000	2.297
Legal information	53 @	5	(17)	2.778	2.825	1.000	2.534
Aging content	54 @	6	(19)	2.550	2.667	1.000	2.290
Physical education and exercise	57	7	(20)	2.545	2.538	1.000	2.221
Estate planning	51 @	8	(21)	2.542	2.569	1.000	2.187
Learning to live alone	52 @	9	(22)	1.484	2.222	1.000	2.176

*"Combined Rank" represents position in both "Process" and "Content" categories.
@ Content items that are age specific for senior learners.

process and content groupings. "Self expression" was in the process groupings of educational needs and "Self awareness, self growth, and values clarification" was grouped in the content cluster of needs. They were ranked closely and were in the upper one-half (rankings, #8 and #9, respectively). The general feelings of the subjects as reported by interviewers in critical incident reporting was that most subjects responded favorably to the notion that the acquisition of knowledges is of central importance for "all people, regardless of age."

The content items were also sub-divided into two categories: senior age-related and those not age specific. Items #49-54 were age specific for senior learners and items #55-57 were not age specific. "Physical education and exercise" was the only non-age specific item that did not rank higher than the age specific items. The two lowest ranked items were senior-learner specific items: "Estate planning" (ranking #21) and "Widowhood or learning to live alone" (ranking #22). However, the re-training question was considered an age-related item and it ranked in the upper thirteen (combined ranking #9). Variance tended to be less for items high in the combined ranking than those lower in the ranking.

Cross tabulations yielded four items which could be associated with demographic variables. The chi square demonstrated significance at a $< .01$ level unless otherwise

noted. The four items were:

Item 38. Active and meaningful involvement of time (combined ranking #3).

Item 43. Lifelong learning opportunitites (combined ranking #1).

Item 50. Retirement or post-retirement planning (combined ranking #15).

Item 56. Self awareness, self growth, and values clarification (combined ranking #9).

For purposes of analysis, each item will be considered separately.

Active and Meaningful Involvement of Time

The findings indicate that active and meaningful involvement of time represent a greater need for women in the study than for the men. Of the women, 57.5 percent responded "extremely high" and 27.5 percent responded "highly important." This is in contrast to the men in the study where 24 percent responded "extremely high" and 44 percent responded "highly important." Chi square testing revealed a statistical significance at a .01 level.

Lifelong Learning Opportunities

Again, the findings indicate a greater need for women subjects than for the men. For the women, 61 percent indicated that lifelong learning opportunities was an "extremely high" need while 25 percent of the men expressed an "extremely high" need level. Also, 90.3 percent of the women in the study identified lifelong learning as either a

"high" or an "extremely high" need while 62.5 of the men responded similarly. Chi square testing revealed a statistical significance at a .01 level.

Retirement or Post-retirement Planning

The findings indicate that retirement or post-retirement planning represents either an extremely high or an extremely low level of need among women respondents, whereas for men, this need is fairly evenly distributed across four of the five need levels. Chi square testing revealed a statistical significance at a .03 level.

Self Awareness, Self Growth, and Values Clarification

The findings show that 63.4 percent of the women indicated "high" or an "extremely high" level of needs while 54.2 percent of the men also indicated the same two levels of need. However, the difference between the two groups was in the "extremely high" level where 43.8 percent of the women and 4.2 percent of the men responded. Chi square testing revealed a statistical significance at $<.01$.

Summary

This section of the findings has reported on perceptions of senior learners regarding reasons why they were attending the university. Twenty-two educational need statements were individually ranked as to their relative importance by the respondents. The three needs which

respondents considered the most important pertained to lifelong learning opportunities, opportunity to hear and interact with people eminent in their respective fields and meaningful involvement of time. The most frequently indicated response to each of these three need statements on a scale of one to five was five, "of extremely high importance."

Educational need statements were categorized as to whether they were process or content in nature. Respondents clearly distinguished between the two categories and attributed more importance to process needs. The content need statements were also divided into senior age-related needs and non-age-related needs. In general, those need items considered age-related received lower ranking than those not age-related.

Cross tabulations of educational need responses by selected demographic and related variables produced four need items that could be associated with the sex of the subject. On two of the three top ranked educational need statements, women ranked the need as significantly more important than did their male counterparts.

Barriers

The third class of information required in an analysis of the relationship between senior learners and the university is described by the term "barriers." As used in this research, a barrier was considered to be any obstacle which impedes the process of need satisfaction.

From a need assessment perspective, it was reasoned in this instance that the identification of barriers could be best approached by asking those individuals actually attending the university to identify the barriers that affected their use of the university.

For study purposes, barriers were classified as either institutional or personal. The classification scheme was based on the presumed locus of the perceived barrier, i.e., is the domain in which the barrier located essentially within institutional or personal control?

In general, the senior learner study group reported that few barriers affected their use of the university. Table XII displays data regarding barriers. The senior learners indicated that institutional constraints offer more limitations to participation levels than do personal barriers. At least 21.5 percent of the study group experienced one of the "Institutional Barriers." The range of response for these barriers was from 21.5 percent to 44.4 percent. The range of responses for "Personal Barriers" was 6.2 percent to 23.1 percent. The three most frequently reported institutional barriers pertained to the structure of class times, relevance of curriculum and what was viewed as restrictive enrollment procedures. The "other" comments under "Institutional Barriers" tended to cluster around four areas: class scheduling related problems (eleven written-in comments); Health Fees/Student Activities Fees

TABLE XII

INSTITUTIONAL AND PERSONAL BARRIERS THAT INHIBIT SENIOR LEARNERS FROM FULL PARTICIPATION IN THE UNIVERSITY BY PERCENTAGES

BARRIER	PERCENTAGE REPORTING "YES"
INSTITUTIONAL BARRIERS	
Admissions	23.4
Costs, tuition and books	27.7
Class time structure	38.5
Geographic distance	21.5
Grades, credit hour orientation	21.5
Irrelevant curriculum	35.4
Architectural constraints	29.2
Restricted enrollment	44.4
Others	(94.4)
PERSONAL BARRIERS	
Transportation	7.7
Physical limitations/illness	16.9
Lack of college experience	7.7
Lack of interest in utilizing facilities	6.2
Money for tuition and books	23.1
University cannot meet needs	15.4
Others	(13.6)

(seven written-in comments); Parking/Transportation related problems (seven written-in comments); and, curriculum concerns (five written-in comments). The remaining comments tended to be related to specific programs.

Money for tuition and books was the most frequently reported personal barrier. Nine "other" comments were made regarding "Personal Barriers." They ranged in content from "my wife" to "I was so scared when I started that my heart just pounded." Two general areas received more than one comment: problems of full-time employment and attending school (three comments) and health (two comments, arthritic and deafness). Appendix C contains all open-ended responses.

Summary

The finding of importance in this section was the lack of consensus on perceived barriers which have seriously affected use of the university by the senior students. While there were individual expressions of concern, in no instance was a specific barrier identified by more than forty-four percent of the respondents.

Roles of the University

The last information area needed in assessing the educational needs of senior learners and university activities which assist in satisfying these needs was a determination of university roles or activities which are important to senior learners.

The interview schedule contained twenty statements (or item sets) each specifying a role or activity performed by the university. Respondents were asked to indicate a level of importance on a rating of one to five for each of these roles (1 = of no importance to 5 = of extremely high importance). The subjects were asked to report their perceptions of the importance these roles for individuals in their own age group and for the total population of the university. The degree of relationship between the two sets of data is displayed in Table XIII. The three measures utilized demonstrate high levels of association. Each item set showed a level of association at < .01 level of significance.

Also, using the rating of one to five, all responses tended to be high with a few exceptions. Out of the twenty item sets, one showed a median response below three:

Item 71 - Traditional Religiousness (total population 2.86)

Item 72 - Traditional Religiousness (senior learner 2.86)

For all forty items (20 item sets), twenty-four responses in the four range, fourteen in the three range, and two in the two range. The total range of responses was 2.86 to 4.54. The highest median rank was for "Advanced Training" for the total population. Although perceived differences between the two groups were minimal, some items were slightly higher for senior learners than for the total population. These data are displayed in Table XIV.

TABLE XIII

CORRELATIONS BETWEEN THE ROLES OF THE UNIVERSITY FOR THE TOTAL POPULATION AND FOR THE SENIOR LEARNER AS PERCEIVED BY THE SENIOR LEARNER

ROLE OF UNIVERSITY	# OF ROLE ITEM ON INSTRUMENT				
	For Total Population	For Senior Learner	r^*	$r_s{}^*$	τ^*
Academic Development	B61	B62	.48	.57	.53
Intellectual Orientation	B63	B64	.47	.57	.55
Individual Personal Development	B65	B66	.43	.48	.46
Humanism/Altruism	B67	B68	.76	.79	.74
Cultural/Aesthetic Awareness	B69	B70	.75	.77	.73
Traditional Religousness	B71	B72	.85	.84	.79
Vocational Preparation	B73	B74	.65	.63	.58
Advanced Training	B75	B76	.53	.56	.52
Research	B77	B78	.69	.73	.68
Meeting Local Needs	B79	B80	.61	.66	.62
Public Service	B81	B82	.68	.76	.71
Social Egalitarianism	B83	B84	.87	.87	.83
Social Criticism/Activism	B85	B86	.72	.73	.68
Fredom	B87	B88	.76	.76	.72
Democratic Governance	B89	B90	.85	.84	.80
Community	B91	B92	.87	.87	.86
Intellectual/Aesthetic Environment	B93	B94	.80	.83	.79
Innovation	B95	B96	.76	.77	.74
Off-Campus Learning	B97	B98	.83	.82	.76
Institutional Accountability	B99	B100	.79	.80	.76

*Significant; $p < .001$.

TABLE XIV

SCORES FOR MATCHED ITEMS WHERE MEDIANS FOR SENIOR LEARNERS WERE HIGHER THAN FOR TOTAL POPULATION

CATEGORY	AGE 55+	TOTAL POPULATION
HUMANISM/ALTRUISM	4.28	4.14
CULTURAL/AESTHETIC	3.81	3.62
MEETING LOCAL NEEDS	4.21	4.07
PUBLIC SERVICE	4.10	4.09
COMMUNITY	4.61	4.44
INTELLECTUAL & AESTHETIC ENVIRONMENT	4.50	4.37
INSTITUTIONAL ACCOUNTABILITY	4.07	3.97

Summary

The selected group of senior learners place considerable importance on the various roles played by the university. Additionally, they perceive little differences between the relative importance of these roles for the total population and for the senior learner group.

CHAPTER V

SUMMARY, CONCLUSIONS AND IMPLICATIONS

The need assessment research has been concerned with needs of senior learners which may be satisfied through university attendance. In general terms, the research developed from an interest in this country's aging and its effects on the institution of education. The demographic data demonstrate that population trends show that the country is aging. Previous to 1972, the median age of citizens of the United States had been dropping with the low point of 27.9 years reached in 1971. Currently, the median age in the United States is estimated to be 29.7 years of age. By the year 2000, the projected median age will be 34.8 years.[1]

Literature pertinent to the study suggested that as a consequence of this aging process, important changes can be expected in institutional structures of this country. Recent federal legislation changing the mandatory retirement age from sixty-five to seventy may be cited as an example of how economic institutions are being influenced by changes in the age structure of the nation. Perhaps the clearest

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[1]U.S., Department of Commerce, Bureau of the Census, Population Estimates and Projections, p. 10.

evidence of the growing importance of the older segment of our population was passage of the Older Americans Act of 1965 (PL 89-73). Passage of the Act and its subsequent amendments represents a measure of the increasing political importance of older people. The national goals embodied in the Older Americans Act support the premise that special attention will be given to the "needs" of these citizens in future years.

Historically, this country's educational institutions have been primarily concerned with educational needs of the young. As the actual number and proportion of the young decline, major changes in this nation's system of education seem inevitable. An underlying assumption of this research is that in the past the needs of older Americans have not been fully addressed. Also, attention to the role of education in meeting the needs of the nation's older citizens appears both timely and appropriate.

Summary and Conclusions

This research has analyzed the educational needs of older Americans as they have relevance to educational activities at the university level. The study involved a definition and a conceptual framework for understanding human need which served both as a justification for considering the needs of "senior learners," and as a basis for the methodology employed to answer the four study questions which structured the need assessment.

Four propositions undergirded the need assessment research. They were:

1. All humans are motivated by innate needs which are developmental in nature and which persist throughout life.

2. The human is an integral part of a social environment which influences the extent and circumstances through which need satisfaction occurs.

3. Human needs can be categorized as being either basic or growth oriented.

4. The humanistic and societal goal of education is ultimately the self-actualization of members of society.[1]

Maslow's work provided much of the theoretical bases for these four propositions. Further support for this study was found in selected writings of Schaie, Strother and others who challenged earlier findings which claimed a general intellectual decline over a person's life span.[2] McClusky's analysis of the educational needs of persons in later years was also useful. He noted, as have others, special problems confronted by the nation's older citizens in dealing with the increasing tempo of societal change. There is a growing need for "means" to be available to obtain and maintain new knowledge and skills. McClusky

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[1]For discussion, see Chapter II, p. 27.

[2]Schaie et al., "Cross-Sequential Study of Age Changes in Cognitive Behavior," pp. 671-80.

cited low educational attainment levels of large numbers of older Americans as imposing a special disadvantage in coping with a rapidly changing environment.[1] His primary concern has been directed toward increasing educational opportunities for older people as a way of acquiring or updating knowledge and skills required for meeting basic needs. It may also be argued that higher order needs as well warrant concern.

The need assessment study was based on the previously mentioned propositions and contained three major elements:

1. A population possessing unmet needs (in this instance, older Americans having unmet basic and/or growth needs).

2. Barriers which interfere with the natural process of need satisfaction.

3. A resource available for purposes of need satisfaction, i.e., a univeristy.

The discussion which follows treats these three elements and presents a profile of the senior learner in the study.

Profile

The profile of the senior learner reflected two observations noted in Chapter I: in the general population, women outnumber men in the older age ranges and women have higher educational attainment levels than men. The preponderance of women in the study group (two out of three

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[1] McClusky, "Education for Aging," p. 10.

enrollees) affected the data. However, considering the large proportion of women in the study group, the teaching profession was not largely represented (8.1 percent) and few women categorized themselves as homemakers.

The ages of the respondents were between fifty-five and seventy. A general conclusion was that most of the senior learners were white, married, still employed to some degree, and had professional-technical occupational backgrounds. The senior learners were financially comfortable and most (74.2 percent) had a baccalaureate degree. It might be speculated that because of their previous experience with universities, these senior learners tended to utilize both academic and non-academic opportunities at the university. And there was evidence of the relative importance of higher education to this group in that many of their parents, spouses and children had attended college. Many of these senior learners had previously attended The University of Oklahoma. It is interesting to note that they returned to the institution where they received their undergraduate degree to seek additional higher education. This would suggest that the alumni represent a group for whom the university may satisfy certain needs through educational programming.

In view of much of the educational programming available for older Americans in the content areas of self-enhancement and leisure time activities, it was surprising

to note that one-half of these senior learners were planning to earn a degree, i.e., they were specific in their educational goals. Further, 78 percent of the total study group intended to enroll again. This finding suggests that special educational programming may not be required for senior learners.

In summary, the selected senior learners who participated in this study were young-olds who reflected descriptors in Neugarten's definition.[1] These descriptors include: good health, relative affluence, and freedom from earlier family responsibilities. The study group did not evidence the characteristics of "disengagement." The fact that many reported interest in working toward a degree in their studies at The University of Oklahoma suggests that they anticipate an "active" or "engaged" future.

Educational Needs

"Lifelong learning opportunities" was identified as the most important educational need by the study group of senior learners. Following closely in the ranking of educational needs were "accessibility and opportunity to hear and interact with people eminent in their respective fields" and "active and meaningful involvement of time."

A related finding shows that the women in this study were likely to rank "lifelong learning" as a more important need than were their male counterparts. Such sex-linked

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[1]For discussion, see Chapter II, pp. 23-24.

differences suggest the need for investigations using a larger number of subjects and involving other universities. If it can be shown that women are more likely to be motivated to seek "lifelong learning" opportunities than men, this finding could also have significant implications for university administrators. Inasmuch as the proportion of women over men increases with advancing age, and the educational attainment level of women is greater than men, it seems reasonable to conclude that increasingly larger numbers of senior learners with characteristics of this study group will find the utilization of university facilities to be need satisfying.

It was also of interest that in terms of senior age-related and non age-related educational content, the study group of senior learners did not view themselves belonging to a special category of learner, i.e., a senior learner. This finding would suggest that special courses or programming based upon age is not a need to which this group might respond.

In summary, the literature review revealed fewer than ten references that could be considered related to educational needs of older Americans and the university's ability to satisfy those needs. The literature reflected that most educational programming in higher education for older Americans has been either non-traditional in format or aimed at age-related content or designed only for senior learners.

The senior learners in this study indicated they do not want separate programs for older people. They reported that their needs can best be met in an intergenerational setting. They also indicated that age-related content was not their primary need in terms of the University's response.

Barrier

All of the selected senior learners in the study indicated that present barriers exist which limit their level of participation at The University of Oklahoma. Although the array of responses was scattered, there is evidence that personal and institutional barriers exist which if removed, would increase participation among senior learners. The only reported barrier that approached affecting the majority of this study group was "restricted enrollment" (44.4 percent of the total study group).

The University

The roles of the university as now defined are consistent with the needs of the study group and in terms of intensity, they are consistent with the needs of the total population who attend the university as perceived by the senior learner group. The senior learners indicated that they perceived the roles to be the same for both senior learners and for the total population. In fact, they ranked all roles or activities at a "of medium importance" level with the exception of "traditional religiousness." This

finding supports the findings in the educational need section in that senior learners do not see themselves as a special group, but as learners who require and need the same kind of institutional supports as do all other students. These findings suggest that this study group needs little age-related special programs or assists.

Implications

Implications derived from the present study should be viewed in terms of the limitations of the study and the purposes of the need assessment. The major findings of the study indicate that older Americans have growth needs and that the university is able to meet those needs. Further, senior learners do not perceive the role of the university to be more different for them than for the total population. They do not need educational content related to aging and they do not need specially developed programs for senior learners. They are actively engaged in maximizing their potential and see the university as a means or mechanism for self-actualization. Specific implications of the findings will be discussed in terms of limitations, programming and institutional support arrangements for senior learners.

Limitations

If the study were attempted anew, several factors could be considered. The primary consideration would be

the design limitations and the ability to generalize from the study sample. The effort represented one approach to a several segment need assessment. A complete need assessment might also include groups of seniors not utilizing the university, seniors who may have initiated enrollment or made contact with the university but who did not actually enroll, and seniors who have chosen other university programs to satisfy their educational needs. Additionally, those people who are currently involved in educational programming for the senior learners or who are potential service providers could augment the assessment.

The ability to generalize is also limited because of the size of the study group. Because of the size, some areas could not be examined, for example, the courses in which the senior learners were enrolled. Additionally, certain inferences could not be made about some of the data because of the few seniors who reported the information, such as the small number of seniors who were fully retired.

Finally, the data collection technique of interviewing was costly. Costs involved travel expenses and interviewer fees. The interview process provided a high level of participation from a study group that was small. However, for a large scale project or more extensive study, the costs may be prohibitive.

Programming for Senior Learners

Since one of the aims of need assessment is to guide the planning process, consideration of the people and the content is an appropriate outcome of a need assessment. Senior learners in the study are in traditional on-campus academic programs; they are interested in existing courses and are not interested in age-specific content; and they are a part of the campus mainstream, not in a separate program unit. They indicate that the university is able to meet their needs. The study suggests that senior alumni and seniors with an existing relationship to the university are potential senior learners. Those people who are actively engaged in the pursuit of their full potential but who have not connected with the university are also potential senior learners. And certainly, the findings would indicate that female seniors appear more likely to enroll than male seniors.

The senior learners are also degree oriented. Educational programming that is currently in place satisfies the needs of these senior learners. Their needs are not age-related and they prefer an intergenerational setting. They clearly feel that the role of the university in meeting their needs is no different for them than for other students.

Institutional Support Arrangements

Senior learners do have barriers. There was little agreement among the identified barriers and the res-

ponses were scattered across the inventory. All of the barriers listed on the inventory could affect any student and universities are generally able to assist in removing or diminishing the constraints. Barriers for senior learners could be overcome with traditional responses that recognize the situational differences in all students but which are sensitive to barriers that are unique to senior learners.

Future Study

The problem addressed in this study was: What are the educational needs of older Americans and the role of the university in meeting these needs? An intriguing facet of the findings is that all of the highly ranked educational need items could be described as growth needs. Future study on the distinction between basic and growth needs would further an understanding of educational needs. Support for such an inquiry is found in the work of Alderfer.[1] Using need formulations based on the work of Maslow, Alderfer tested hypotheses which may have some bearing on this research. Two of Alderfer's hypotheses are of special interest:

1. The more relatedness needs are satisfied, the more growth needs will be desired.
2. The more growth needs are satisfied, the more they will be desired.

Alderfer's findings provided empirical support for both hypotheses.[2] The second proposition by Alderfer is of

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[1]Alderfer, Existence, Relatedness and Growth, p. 13.

[2]Ibid., pp. 132-43.

particular import to the current research on senior learners. In essence, the proposition holds that growth is intrinsically satisfying. This position is also maintained by Maslow, i.e., the more growth is experienced, the more it will be sought.[1] There is evidence that this is the case for the senior learners in the study. Has lifelong learning become intrinsically satisfying for many of the senior learners? Has learning become an end activity? Is there a difference in levels of need for those who attend the university as opposed to those who attend other institutions of higher education? If so, the data may provide important programming implications for university planners and administrators.

Male-female differences in educational needs are apparent and have also been reported by Goodrow in his study on levels of participation.[2] Pursuit of these differences could provide direction in the area of educational programming and in the responses of institutional support systems. For example, if women are more likely to attend the university, then recruitment and financial aids efforts could be directed towards young-old women. Senior women who attend the university may be more interested in professional areas of academic programming while senior men may be more interested in pursuit of areas of interest that may spread across

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[1]Maslow, Toward a Psychology of Being, p. 31.

[2]Goodrow, "Limiting Factors in Levels of Participation": 418-22.

several academic units. What effect might these kinds of enrollments have on these academic units?

Some areas of future study were referred to previously, in terms of multiple approaches to the educational needs of senior learners which would augment and expand data from the target population survey. Additional future areas of study regarding different populations of senior learners include: Are the educational needs of special program senior learners different from the educational needs of senior learners in the regular on-campus program of the university?; Are there educational needs of seniors who do not utilize the university that would be satisfied through the university?; What are the barriers for potential senior learners which limit or prohibit participation or enrollment at the university?

The requirement of "need assessments" as a part of funding and accountability processes is becoming increasingly prevalent. It is a part of higher education. The Higher Education Amendments of 1976 (P.L. 94-492) extended and revised the Higher Education Act to include a federal program of planning, assessment, and coordination of lifelong learning activities (Title I, Part A). Further, a part of the state's requirements for grants is a need assessment activity which serves as a base for funding of state lifelong learning programs. This legislation provided $40 million for each of the fiscal years 1977 through 1982 for

lifelong learning programs. Need assessment activities can be expected to increase in prevalence and complexity. These need assessment activities may be expected to increase in the field of higher education. It was the intent of this study to provide a beginning effort at assessing the educational needs of senior learners who attend a university.

The numbers of older Americans are increasing rapidly and demographic trends project even larger cohorts. For many reasons, this once small group has not been apparent in universities. With swelling numbers and with a focus on continued activity, the older American's educational needs can be met by universities.

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APPENDICES

APPENDIX A

THE TEXT OF

LETTER TO

SENIOR LEARNER SUBJECTS

AND

THE INSTRUMENT

The University of Oklahoma 601 Elm, Room 520 Norman, Oklahoma 73069

Center for
Studies in Higher Education
College of Education

May 20, 1977

We are currently doing research in the area of educational interests and needs of the "senior adult learner" and the role of the University in meeting those needs. According to Admissions and Records, you have been enrolled at the University of Oklahoma during the last year. Since you have been utilizing the University, your experiences are valuable.

We wonder if you would mind spending about forty-five minutes with an interviewer? The interview is carefully structured around the importance of specific and generalizable educational needs of senior learners and tasks of the University. An interviewer will be contacting you sometime after May 22. The person who will be contacting you will

It is our hope that this research will lead to an affirmative response to the educational needs of persons like yourself. We hope you will be able to help us. Should you have any questions, please phone me at 325-2821 or 329-2006.

Thank you.

Sincerely,

Julia M. Norlin, Assistant Prof.
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EDUCATIONAL NEEDS OF SENIOR LEARNERS

AND

ROLES OF THE UNIVERSITY

Purpose: The purpose of this study is to explore particularized needs of senior learners and the roles of the university in meeting these needs. Additionally, we hope to develop a profile of the senior learner and barriers that prohibit this learner from utilizing the university to its potential.

The Interview: The information we hope to gain will be secured by a trained interviewer. The interview will be structured around a schedule and will take approximately forty-five minutes. Information you give us will remain anonymous. The data will be summarized and analyzed but at no time will your name appear in or be identified with the study in any way.

Thank you for participating.

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☐ Check if you know the interviewer.

Complete the following information:

No.:	Code:	Question:
1.	(1:1-3)	Identification number _____ (The first digit is the interviewer's number and the next two are the respondent's.)
2.	(1:4-5)	Age (last birthday) _____ (code the number of years).
3.	(1:6)	Sex: M _____(0) F _____(1).
4.	(1:7)	Race: White (1)_____ Black (2)_____ American Indian (3)_____ Mexican American (4)_____ Other (specify) (5)_____.
5.	(1:8)	Marital status: Married (1)_____ Single (2) _____ Widowed (3)_____ Separated (4)_____ Divorced (5)_____ Other (6)_____.
6.	(1:9)	Employment status: Employed full-time_____(1) Partially retired_____(2) (employed less than 40 hrs/wk.) Fully retired_____(3) (no current employment) Fully retired_____(4) (currently employed part-time) Homemaker_____(5) Medical disability_____(6) Others (specify)_____(7) Fully employed and fully retired_____(8).

7. (1:10) If partially or fully retired, indicate the number of years since formally retired:

Less than 1 year (1)_____ 1-3 years (2) _____ 4-6 years (3)_____ 7-9 years (4) _____ 10 years or more (5)_____ Homemaker (6)_____ N.A. (7)_____.

8. (1:11) Occupation (major-paid): Professional-Technical (1)_____ Farmer (2)_____ Homemaker (3)_____ Administrative (salaried) (4)_____ Clerical, sales and kindred worker (5)_____ Minister (6)_____ Craftsman, foreman and kindred worker (7) _____ Driver, factory and kindred worker (8)_____ Teacher (9)_____ N.R. (0)_____.

9. (1:12-13) Years of school completed (ask for actual grade/years completed as follows):

Grades 1-12 _____(01-12)

GED _____(13)

College _____(14 - 1 year; 15 - 2 years)

A.A. degree _____(16)

College _____ (17 - 3 years; 18 - B.A. or B.S.)

Teaching certificate _____(19)

Graduate _____(20 - graduate certificate; 21 - one year of graduate school; 22 - two years of graduate school and/or M.A., M.S.W., etc.)

Graduate (con't.) _____(23 - third year; 24 - fourth year or more without terminal degree; 25 - Doctorate or terminal degree; 26 - other. If other, please list).

10. (1:14) College or university granting most recent degree if applicable:

Not applicable (1)_____ University of Oklahoma (2)_____ Another Oklahoma college or university (3)_____ College or university outside Oklahoma (4)_____.

11. (1:15) Major field of study: Not applicable (1)_____

Education (2)_____ Liberal Arts (3)_____

Fine Arts (4)_____ Business (5)_____

Science (6)_____ Engineering (7)_____

Ministry (8)_____ Other professional (9)_____

Specify if other* (0)_____ (N.R. - leave blank).

(*Mark if 2 degrees at same level and specify.)

12. (1:16) Year in which last course was taken at a college or university:

Not applicable (1)_____ before 1930 (2)_____

1931-1940 (3)_____ (1941-1950) (4)_____

1951-1960 (5)_____ 1961-1970 (6)_____

1971-75 (7)_____ 1976 or later (8)_____.

13. (1:17) Year in which you last attended a conference or workshop on a college campus:

None (0)_____ before 1950 (1)_____

1951-1960 (2)_____ 1961-1970 (3)_____

1971-75 (4)_____ 1976 or later (5)_____.

14. (1:18) How many functions (other than educational) have you attended on a college or university campus during the past 12 months (theatre, speaker, athletic event, etc.)?

None (1)_____ 1-3 (2)_____ 4-6 (3)_____

7 or more (4)_____.

15. (1:19) Current household yearly income:

Under - $ 5,999 _____(1)

$ 6,000 - 11,999 _____(2)

$12,000 - 24,999 _____(3)

$25,000+ _____(4)

16. (1:20) Did either of your parents attend college?

Yes _____(1) No _____(2) Unknown _____(3)

17. (1:21) If married, did your spouse attend college?

Yes _____(1) No _____(2)

Never married _____(3)

18. (1:22) Number of children: None _____(0)

1 _____(1)

2-4 _____(2)

5 or more _____(3)

19. (1:23-24) Number of children that attended college:

_____ (insert number)

Number of grandchildren that attended college: _____ (insert number)

During which semesters were you enrolled at O.U.
(check all where applicable)

20. (1:25) Summer, 1975 - Yes _____(1) No _____(2)

21. (1:26) Fall, 1975 - Yes _____(1) No _____(2)

22. (1:27) Spring, 1976 - Yes _____(1) No _____(2)

23. (1:28) Summer, 1976 - Yes _____(1) No _____(2)

24. (1:29) Fall, 1976 - Yes _____(1) No _____(2)

25. (1:30) Spring, 1977 - Yes _____(1) No _____(2)

While you were enrolled at O.U., which colleges did you take courses in? (check all where applicable)

26. (1:31) Education - Yes _____(1) No _____(2)

27. (1:32) Liberal Arts - Yes _____(1) No _____(2)

28. (1:33) Fine Arts - Yes _____(1) No _____(2)

29. (1:34) Business - Yes _____(1) No _____(2)

30. (1:35) Science - Yes _____(1) No _____(2)

31. (1:36) Engineering - Yes _____(1) No _____(2)

32. (1:37) Other professional - Yes _____(1) No _____(2)

33. (1:38) Specify in others _____(1)

34. (1:39) Are you working on a degree?

Yes _____(1) No _____(2) Undecided _____(3)

35. (1:40) Do you plan to enroll again?

Yes _____(1) No _____(2) Undecided _____(3)

36. If no, why not? (Interviewer, please tabulate.)

The purpose of this portion of the questionnaire is to examine the educational needs of senior learners. Both content and "process" or context goals comprise the questionnaire.

The following items represent some educational needs of senior learners. In the left hand column next to each educational need, mark the value you would personally ascribe to the stated need.

1 - of no importance, or not applicable

2 - of low importance

3 - of medium importance

4 - of high importance

5 - of extremely high importance

LEVEL OF IMPORT	EDUCATIONAL NEEDS
36. (1:41) _____	Contact within an open and stimulating environment with other senior learners.
37. (1:42) _____	Contact within an open and stimulating environment with multi-generational groups.
38. (1:43) _____	Active and meaningful involvement of time.
39. (1:44) _____	Opportunity to give attention to and to receive attention from other people.

LEVEL OF IMPORT	EDUCATIONAL NEEDS
40. (1:45) _____	Utilization of job/career and life experiences in helping other individuals with specific needs.
41. (1:46) _____	Directed learning/studying about subjects in which you have an interest but not a strong background.
42. (1:47) _____	Directed learning/studying about subjects in which you have an interest and a strong background.
43. (1:48) _____	Life-long learning opportunities.
44. (1:49) _____	Accessability and opportunity to hear and interact with people eminent in their respective fields.
45. (1:50) _____	Accessability and opportunity to participate in special programs on campus (student intern, Scholar-Leadership Enrichment Program, etc.).

LEVEL OF IMPORT	EDUCATIONAL NEEDS
46. (1:51) _____	Accessability and opportunity to attend and/or participate in artistic endeavors available on campus.
47. (1:52) _____	Accessability and opportunity to attend and/or participate in recreational and leisure time facilities available on campus.
48. (1:53) _____	Self expression.
49. (1:54) _____	Re-training or new training for entrance into a new employment or post-retirement occupation.
50. (1:55) _____	Retirement or pre-retirement planning.
51. (1:56) _____	Estate planning.
52. (1:57) _____	Widowhood or learning to live alone.

LEVEL OF IMPORT	EDUCATIONAL NEEDS
53. (1:58) _____	Legal information and services related to retirement and aging-related situations (age discrimination, S.S.I. policies, inheritance laws, etc.).
54. (1:59) _____	Dealing with the social stresses of aging.
55. (1:60) _____	Community involvement.
56. (1:61) _____	Self awareness, self growth and values clarification.
57. (1:62) _____	Physical education and exercise.
58. (1:63) _____	OTHERS:_____
59. (1.64) _____	_____
	_____
	_____

Institutional and personal barriers exist that limit or constrain our participation in activities and programs. Check any of the following barriers that might be a barrier to <u>your</u> use of the University.

		NO	YES	
				INSTITUTIONAL BARRIERS
60.	(1:65)	____(0)	____(1)	Admission requirements and procedures.
61.	(1:66)	____(0)	____(1)	Cost of tuition and books.
62.	(1:67)	____(0)	____(1)	Time structure of classes, i.e., 18 wk. semester, 2 or 3 days a week, 50 minute class periods, etc.
63.	(1:68)	____(0)	____(1)	Geographical distance from a campus facility.
64.	(1:69)	____(0)	____(1)	Grades, credit hour and degree-oriented focus of the University.
65.	(1.70)	____(0)	____(1)	Irrelevant curriculum.
66.	(1:71)	____(0)	____(1)	Architectural constraints (steps, parking, distance between classes).
67.	(1:72)	____(0)	____(1)	Restricted enrollment in some classes and academic programs.
68.	(1:73)	____(0)	____(1)	OTHERS (specify):_____
				_____
				PERSONAL BARRIERS
69.	(1:74)	____(0)	____(1)	Transportation.
70.	(1:75)	____(0)	____(1)	Physical limitations or chronic illness.
71.	(1:76)	____(0)	____(1)	Lack of past college experience.
72.	(1:77)	____(0)	____(1)	Lack of interest in utilizing University facilities and services.

PERSONAL BARRIERS (con't.)

	NO	YES	
73. (1:78)	____(0)	____(1)	Money for tuition, books, additional fees, etc.
74. (1:79)	____(0)	____(1)	Feelings that the University cannot meet your needs.
75. (1:80)	____(0)	____(1)	OTHERS (specify):_____

_____

END OF CARD ONE

(2:1-3) Identification number _____ (same as first card).

The purpose of this portion of the questionnaire is to explore perceptions of the role of the university. This is to be done in two ways: a general or over-all view of the university's role and the university's role as it particularly relates to individuals in your age group.

The following items represent clusters of perceived university roles. In the left hand column next to each role description, mark the value you would give to each of the goals. First, mark the value you would assign each role description for the total population and secondly, mark the value you would assign the role description for individuals 55 years of age and older.

1 - of no importance, or not applicable

2 - of low importance

3 - of medium importance

4 - of high importance

5 - of extremely high importance

LEVELS OF IMPORT		ROLES OF THE UNIVERSITY
Total pop.	55 yrs. and older	
61. (2:4)	62. (2:5)	Academic Development: Acquisition of general and specialized knowledge, preparation of advanced scholarly study, and maintenance of high intellectual standards on campus.

LEVELS OF IMPORT		ROLES OF THE UNIVERSITY
Total pop.	55 yrs. and older	
63. (2:6)	64. (2:7)	Intellectual Orientation: Familiarity with research and problem-solving methods, the ability to synthesize knowledge from many sources, the capacity for self-directed learning, and a commitment to life-long learning.
65. (2:8)	66. (2:9)	Individual Personal Development: Identification by learners of personal goals and development of means for achieving them, enhancement of a sense of self-worth and self-confidence, self-understanding, and a capacity for open and trusting interpersonal relations.
67. (2:10)	68. (2:11)	Humanism/Altruism: Respect for diverse cultures, commitment to working for world peace, consciousness of the important moral issues of the time, and concern about the welfare of people in general.

LEVELS OF IMPORT		ROLES OF THE UNIVERSITY
Total pop.	55 yrs. and older	
69. (2:12)	70. (2:13)	Cultural/Aesthetic Awareness: Heightened appreciation of a variety of art forms, required study in the humanities or arts, exposure to forms of non-Western art, and encouragement of active learner participation in artistic activities.
71. (2:14)	72. (2:15)	Traditional Religiousness: Educating learners in a particular religious heritage, helping them to see the potentialities of full-time religious work, developing learners' ability to defend a theological position, and fostering their dedication to serving God in everyday life.
73. (2:16)	74. (2:17)	Vocational Preparation: Specific occupational curricula, programs geared to emerging career fields, opportunities for retraining or upgrading skills, and assistance to learners in career planning.

LEVELS OF IMPORT		ROLES OF THE UNIVERSITY
Total pop.	55 yrs. and older	
75. (2:18)	76. (2:19)	Advanced Training: Developing and maintaining a strong and comprehensive graduate school, providing programs in the "traditional professions" (law, medicine, etc.), offering programs in the "newer" professions (engineering, social work, etc.) and coordinating advanced study in specialized problem areas - as through a multi-disciplinary institute or center.
77. (2:20)	78. (2:21)	Research: Doing contract studies for external agencies, conducting basic research in the natural and social sciences, and seeking generally to extend the frontiers of knowledge through scientific research.
79. (2:22)	80. (2:23)	Meeting Local Needs: Providing for continuing education for adults, serving as a cultural center for the community, providing trained manpower for local employers, and facilitating learner involvement in community-service activities.

LEVELS OF IMPORT		ROLES OF THE UNIVERSITY
Total pop.	55 yrs. and older	
81. (2:24)	82. (2:25)	Public Service: Working with governmental agencies in social and environmental policy formulation, committing institutional resources to the solution of major social and environmental problems, training people from disadvantaged communities, and generally being responsive to regional and national priorities in planning educational programs.
83. (2:26)	84. (2:27)	Social Egalitarianism: Open admissions and meaningful education for all admitted, providing educational experiences relevant to the evolving interests of "previously neglected groups" and offering remedial work in basic skills.

LEVELS OF IMPORT		ROLES OF THE UNIVERSITY
Total pop.	55 yrs. and older	
85. (2:28)	86. (2:29)	Social Criticism/Activism: Providing criticisms of prevailing American values, offering ideas for changing social institutions judged to be defective, helping learners determine how to bring about change in American society, and being engaged, as an institution, in working for basic changes in American society.
87. (2:30)	88. (2:31)	Freedom: Protecting the right of faculty to present controversial ideas in the classroom, not preventing learners from hearing controversial points of view, placing no restrictions on off-campus political activities by faculty or learners, and ensuring faculty and learners the freedom to choose their own life styles.

LEVELS OF IMPORT		ROLES OF THE UNIVERSITY
Total pop.	55 yrs. and older	
89. (2:32)	90. (2:33)	Democratic Governance: Decentralized decision-making arrangements by which learners, faculty, administrators, and governing board members can all be significantly involved in campus governance; opportunity for individuals to participate in all decisions affecting them; and governance that is genuinely responsive to the concerns of everyone at the institution.
91. (2:34)	92. (2:35)	Community: Maintaining a climate in which there is faculty commitment to the general welfare of the institution, open and candid communication, open and amicable airing of differences, and mutual trust and respect among learners, faculty, and administrators.

LEVELS OF IMPORT		ROLES OF THE UNIVERSITY
Total pop.	55 yrs. and older	
93. (2:36)	94. (2:37)	Intellectual Aesthetic Environment: A rich program of cultural events, a campus climate that facilitates learners free-time involvement in intellectual and cultural activities, an environment in which learners and faculty can easily interact informally, and a reputation as an intellectually exciting campus.
95. (2:38)	96. (2:39)	Innovation: A climate in which continuous innovation is an accepted way of life; it means established procedures for readily initiating curricular or instructional innovations, and, more specifically, it means experimentation with new approaches to (a) individualized instruction and (b) evaluating and grading student performance.

LEVELS OF IMPORT		ROLES OF THE UNIVERSITY
Total pop.	55 yrs. and older	
97. (2:40)	98. (2:41)	Off-Campus Learning: Including short-term time away from the campus in travel, work-study, VISTA work, etc.; arranging for learners to study on several campuses during their undergraduate years; awarding degrees for supervised study off the campus; awarding degrees entirely on the basis of performance on an examination.
99. (2:42)	100. (2:43)	Institutional Accountability: Use of cost criteria in deciding among program alternatives, concern for program efficiency (not further defined), accountability to funding sources for program effectiveness (not defined), and regular submission of evidence that the institution is achieving stated goals.

APPENDIX B

TABLES

TABLE 1

DISTRIBUTION BY AGE

AGE	FREQUENCY	RELATIVE FREQUENCY (PCT)	ADJUSTED FREQUENCY (PCT)	CUM FREQUENCY (PCT)
55	11	16.7	17.5	17.5
56	8	12.1	12.7	30.2
57	11	16.7	17.5	47.6
58	11	16.7	17.5	65.1
59	6	9.1	9.5	74.6
60	3	4.5	4.8	79.4
61	4	6.1	6.3	85.7
62	1	1.5	1.6	87.3
63	4	6.1	6.3	93.7
65	2	3.0	3.2	96.8
67	1	1.5	1.6	98.4
70	1	1.5	1.6	100.0
N.R.	3	4.5	MISSING	100.0
TOTAL	66	100.0	100.0	

MEAN: 58.36 years
MODE: 55.00 years
MEDIAN: 57.63 years

TABLE 2

DISTRIBUTION BY SEX

CATEGORY LABEL	ABSOLUTE FREQUENCY	RELATIVE FREQUENCY (PCT)	ADJUSTED FREQUENCY (PCT)	CUM FREQUENCY (PCT)
MALE	25	37.9	37.9	37.9
FEMALE	41	62.1	62.1	100.0
TOTAL	66	100.0	100.0	

TABLE 3

DISTRIBUTION BY RACE

CATEGORY LABEL	ABSOLUTE FREQUENCY	RELATIVE FREQUENCY (PCT)	CUM FREQUENCY (PCT)
WHITE	65	95.5	95.5
BLACK	3	4.5	100.0
TOTAL	66	100.0	

No other racial categories were marked by subject.

TABLE 4

DISTRIBUTION BY MARITAL STATUS

CATEGORY LABEL	ABSOLUTE FREQUENCY	RELATIVE FREQUENCY (PCT)	CUM FREQUENCY (PCT)
MARRIED	52	78.8	78.8
SINGLE	2	3.0	81.8
WIDOWED	8	12.1	93.9
DIVORCED	4	6.1	100.0
TOTAL	66	100.0	

No subjects marked "separated" as a marital status.

TABLE 5

DISTRIBUTION BY EMPLOYMENT STATUS

CATEGORY LABEL	ABSOLUTE FREQUENCY	RELATIVE FREQUENCY (PCT)	CUM FREQUENCY (PCT)
FULL TIME EMPLOYED	33	50.0	50.0
PARTIALLY RETIRED	4	6.1	56.1
NO EMPLOYMENT-RETIRED	14	21.2	77.3
PART EMPLOYMENT-RETIRED	1	1.5	78.8
HOMEMAKER	5	7.6	86.4
MEDICALLY DISABLED	2	3.0	89.4
OTHER	1	1.5	90.9
FULLY RETIRED-FULLY EMPLOYED	6	9.1	100.0
TOTAL	66	100.0	

TABLE 6

DISTRIBUTION BY NUMBER OF YEARS
SINCE FORMALLY RETIRED

CATEGORY LABEL	ABSOLUTE FREQUENCY	RELATIVE FREQUENCY (PCT)	ADJUSTED FREQUENCY (PCT)	CUM FREQUENCY (PCT)
LESS THAN 1 YEAR	7	10.6	10.8	10.8
1-3 YEAR	9	13.6	13.8	24.6
4-6 YEARS	3	4.5	4.6	29.2
7-9 YEARS	2	3.0	3.1	32.3
10+ YEARS	4	6.1	6.2	38.5
HOMEMAKER	4	6.1	6.2	44.6
NA-NOT RETIRED	36	54.5	55.4	100.0
NR	1	1.5	MISSING	100.0
TOTAL	66	100.0	100.0	

TABLE 7

DISTRIBUTION BY OCCUPATION
(MAJOR PAID)

CATEGORY LABEL	ABSOLUTE FREQUENCY	RELATIVE FREQUENCY (PCT)	ADJUSTED FREQUENCY (PCT)	CUM FREQUENCY (PCT)
PROF-TECHNICAL	39	59.1	62.9	62.9
HOMEMAKER	6	9.1	9.7	72.6
ADMIN	5	7.6	8.1	80.6
CLERICAL, SALES	4	6.1	6.5	87.1
CRAFTSMAN, FOREMAN	2	3.0	3.2	90.3
DRIVER, FACTORY	1	1.5	1.6	91.9
TEACHER	5	7.6	8.1	100.0
NR	4	6.1	MISSING	100.0
TOTAL	66	100.0	100.0	

No subjects marked "farmer" or "minister" categories.

TABLE 8

DISTRIBUTION BY YEARS OF SCHOOL COMPLETED

CATEGORY LABELS	CODE	ABSOLUTE FREQUENCY	RELATIVE FREQUENCY (PCT)	CUM FREQUENCY (PCT)
GRADES 1-12	12	0	0	0
GED	13	1	1.5	1.5
COLLEGE 1 YR.	14	2	3.0	4.5
COLLEGE 2 YRS.	15	0	0	0
A.A. DEGREE	16	0	0	0
COLLEGE 3 YRS.	17	14	21.2	25.8
BA BS OR 4 YRS.	18	7	10.6	36.4
TEACHING CERT.	19	1	1.5	37.9
GRAD CERT.	20	3	4.5	42.4
I YR. GRAD.	21	8	12.1	54.5
2 YR. GRAD. MA	22	11	16.7	71.2
3 YR. GRAD.	23	9	13.6	84.8
4 YR.+ WITHOUT T DEGREE	24	7	10.6	95.5
PHD OR T DEGREE	25	3	4.5	100.0
TOTAL		66	100.0	

MEAN: 20.36
MODE: 17.00
MEDIAN: 21.12

TABLE 9

DISTRIBUTION BY COLLEGE OR UNIVERSITY GRANTING MOST RECENT DEGREE

CATEGORY LABEL	ABSOLUTE FREQUENCY	RELATIVE FREQUENCY (PCT)	ADJUSTED FREQUENCY (PCT)	CUM FREQUENCY (PCT)
NA - NO DEGREE	16	24.2	24.6	24.6
UNIV. OF OKLA.	32	48.5	49.2	73.8
COLLEGE OR UNIV. IN OKLA.	11	16.7	16.9	90.8
COLLEGE OR UNIV. OUTSIDE OKLA.	6	9.1	9.2	100.0
NR	1	1.5	MISSING	100.0
TOTAL	66	100.0	100.0	

TABLE 10

DISTRIBUTION BY MAJOR FIELD OF STUDY

CATEGORY LABEL	ABSOLUTE FREQUENCY	RELATIVE FREQUENCY (PCT)	CUM FREQUENCY (PCT)
OTHER	11	16.7	16.7
NA-NO FIELD OF STUDY	1	1.5	18.2
EDUCATION	12	18.2	36.4
LIBERAL ARTS	19	28.8	65.2
FINE ARTS	5	7.6	72.7
BUSINESS	7	10.6	83.3
SCIENCE	2	3.0	86.4
ENGINEERING	2	3.0	89.4
OTHER PROFESSIONAL (H.S.C.)	7	10.6	100.0
TOTAL	66	100.0	

TABLE 11

DISTRIBUTION BY YEAR LAST COURSE WAS TAKEN AT COLLEGE OR UNIVERSITY

CATEGORY LABEL	ABSOLUTE FREQUENCY	RELATIVE FREQUENCY (PCT)	CUM FREQUENCY (PCT)
1951-1960	1	1.5	1.5
1961-1970	2	3.0	4.5
1971-1975	9	13.6	18.2
1976 OR LATER	54	81.8	100.0
TOTAL	66	100.0	

TABLE 12

DISTRIBUTION BY YEAR-LAST ATTENDED CONFERENCE OR WORKSHOP ON COLLEGE CAMPUS

CATEGORY LABEL	CODE	ABSOLUTE FREQUENCY	RELATIVE FREQUENCY (PCT)	ADJUSTED FREQUENCY (PCT)	CUM FREQUENCY (PCT)
NONE	0	13	19.7	21.3	21.3
BEFORE 1950	1	1	1.5	1.6	23.0
1951-1960	2	0	0	0	0
1961-1970	3	3	4.5	4.9	27.9
1971-1975	4	11	16.7	18.0	45.9
1976 OR LATER	5	33	50.0	54.1	100.0
NR	6	5	7.6	MISSING	100.0
TOTAL		66	100.0	100.0	

MEAN: 3.59
MODE: 5.00
MEDIAN: 4.57

TABLE 13

DISTRIBUTION BY HOW MANY NON-EDUCATIONAL FUNCTIONS ATTENDED ON COLLEGE OR UNIVERSITY CAMPUS IN LAST 12 MONTHS

CATEGORY LABEL	ABSOLUTE FREQUENCY	RELATIVE FREQUENCY (PCT)	ADJUSTED FREQUENCY (PCT)	CUM FREQUENCY (PCT)
NONE	16	24.2	24.6	24.6
1-3	10	15.2	15.4	40.0
4-6	16	24.2	24.6	64.6
7 OR MORE	23	34.8	35.4	100.0
NR	1	1.5	MISSING	100.0
TOTAL	66	100.0	100.0	

TABLE 14

DISTRIBUTION BY CURRENT HOUSEHOLD INCOME

CATEGORY LABEL	CODE	ABSOLUTE FREQUENCY	RELATIVE FREQUENCY (PCT)	ADJUSTED FREQUENCY (PCT)	CUM FREQUENCY (PCT)
UNDER $5999	1	9	13.6	15.3	15.3
$6000-11999	2	6	9.1	10.2	25.4
$12000-24999	3	30	45.5	50.8	76.3
$25000+	4	14	21.2	23.7	100.0
NR	5	7	10.6	MISSING	100.0
TOTAL		66	100.0	100.0	

MEAN: 2.83
MODE: 3.00
MEDIAN: 2.98

TABLE 15

DISTRIBUTION BY "DID A PARENT ATTEND COLLEGE?"

CATEGORY LABEL	ABSOLUTE FREQUENCY	RELATIVE FREQUENCY (PCT)	ADJUSTED FREQUENCY (PCT)	CUM FREQUENCY (PCT)
YES	28	42.4	43.1	43.1
NO	36	54.5	55.4	98.5
UNKNOWN	1	1.5	1.5	100.0
NR	1	1.5	MISSING	100.0
TOTAL	66	100.0	100.0	

TABLE 16

DISTRIBUTION BY "DID SPOUSE ATTEND COLLEGE?"

CATEGORY LABEL	ABSOLUTE FREQUENCY	RELATIVE FREQUENCY (PCT)	ADJUSTED FREQUENCY (PCT)	CUM FREQUENCY (PCT)
YES	42	63.6	68.9	68.9
NO	18	27.3	29.5	98.4
NEVER MARRIED	1	1.5	1.6	100.0
NR	5	7.6	MISSING	100.0
TOTAL	66	100.0	100.0	

TABLE 17

DISTRIBUTION BY NUMBER OF CHILDREN

CATEGORY LABEL	CODE	ABSOLUTE FREQUENCY	RELATIVE FREQUENCY (PCT)	CUM FREQUENCY (PCT)
NONE	0	3	4.5	4.5
1	1	9	13.6	18.2
2-4	2	48	72.7	90.9
5 or more	3	6	9.1	100.0
TOTAL		66	100.0	

MEAN: 1.86
MODE: 2.00
MEDIAN: 1.93

TABLE 18

DISTRIBUTION BY NUMBER OF CHILDREN WHO ATTENDED COLLEGE

NUMBER OF CHILDREN	ABSOLUTE FREQUENCY	RELATIVE FREQUENCY (PCT)	CUM FREQUENCY (PCT)
0	3	4.5	4.5
1	16	24.2	28.8
2	23	34.8	63.6
3	14	21.2	84.8
4	6	9.1	93.9
5	3	4.5	98.5
6	1	1.5	100.0
TOTAL	66	100.0	

MEAN: 2.25
MODE: 2.00
MEDIAN: 2.10

TABLE 19

DISTRIBUTION BY NUMBER OF GRANDCHILDREN WHO ATTENDED COLLEGE

NUMBER OF CHILDREN	ABSOLUTE FREQUENCY	RELATIVE FREQUENCY (PCT)	CUM FREQUENCY (PCT)
0	64	97.0	97.0
1	1	1.5	98.5
2	1	1.5	100.0
TOTAL	66	100.0	

TABLE 20

DISTRIBUTION BY "ARE YOU WORKING ON A DEGREE?"

CATEGORY LABEL	ABSOLUTE FREQUENCY	RELATIVE FREQUENCY (PCT)	ADJUSTED FREQUENCY (PCT)	CUM FREQUENCY (PCT)
YES	32	48.5	50.0	50.0
NO	32	48.5	50.0	100.0
NR	2	3.0	MISSING	100.0
TOTAL	66	100.0	100.0	

TABLE 21

DISTRIBUTION BY "DO YOU INTEND TO ENROLL AGAIN?"

CATEGORY LABEL	ABSOLUTE FREQUENCY	RELATIVE FREQUENCY (PCT)	ADJUSTED FREQUENCY (PCT)	CUM FREQUENCY (PCT)
YES	52	78.8	81.3	81.3
NO	9	13.6	14.1	95.3
UNDECIDED	3	4.5	4.7	100.0
NR	2	3.0	MISSING	100.0
TOTAL	66	100.0	100.0	

TABLE XXII

INTERVIEWER RELIABILITY ON PART IV: ROLES OF THE UNIVERSITY AS DETERMINED BY t-TEST ON ROLES FOR TOTAL POPULATION AND SENIOR LEARNERS

VARIABLE	NUMBER OF CASES	MEAN	STANDARD DEVIATION	t-VALUE	2-TAIL PROBABILITY
total population		4.23	.86		
Academic Development	65			.66	.512
senior learners		4.15	.97		
total population		4.27	.78		
Intellectual Orientation	65			.73	.470
senior learners		4.20	.87		
total population		4.28	.76		
Individual Personal Development	64			1.15	.261
senior learners		4.15	.87		
total population		3.98	1.02		
Humanism/Altruism	63			-.50	.616
senior learners		4.03	1.12		
total population		3.69	.89		
Cultural/Aesthetic Awareness	63			-.52	.605
senior learners		3.74	1.09		
total population		3.00	1.24		
Traditional Religiousness	63			.18	.859
senior learners		2.98	1.31		

TABLE XXII--(Continued)

VARIABLE	NUMBER OF CASES	MEAN	STANDARD DEVIATION	t-VALUE	2-TAIL PROBABILITY
total population		4.20	.91		
Vocational Preparation	63			3.27	.002
senior learners		3.84	1.13		
total population		4.31	.89		
Advanced Training	63			1.93	0.58
senior learners		4.07	1.09		
total population		4.00	1.08		
Research	62			.74	.461
senior learners		3.91	1.09		
total population		3.96	.96		
Meeting Local Needs	63			-.56	.576
senior learners		4.03	1.06		
total population		3.93	1.06		
Public Service	63			.29	.771
senior learners		3.90	1.10		
total population		3.19	1.42		
Social Egalitarianism	63			.66	.509
senior learners		3.12	1.50		
total population		3.53	1.18		
Social Criticism/Activism	63			1.30	.199
senior learners		3.38	1.36		

TABLE XXII--(Continued)

VARIABLE	NUMBER OF CASES	MEAN	STANDARD DEVIATION	t-VALUE	2-TAIL PROBABILITY
total population		3.61	1.27		
Freedom	60			.28	.760
senior learners		3.58	1.38		
total population		3.67	1.22		
Democratic Governance	62			.75	.470
senior learners		3.61	1.29		
total population		4.24	.84		
Community	62			-1.76	.083
senior learners		4.33	.84		
total population		4.12	1.00		
Intellectual Aesthetic Environment	63			-.57	.568
senior learners		4.17	1.07		
total population		3.93	1.00		
Innovation	62			.70	.484
senior learners		3.87	1.07		
total population		3.56	1.15		
Off-Campus Training	62			.90	.375
senior learners		3.48	1.26		
total population		3.83	1.09		
Institutional Accountability	61			-1.10	.277
senior learners		3.93	1.06		

APPENDIX C

OPEN-ENDED COMMENTS

Open-ended comments as recorded by interviewers. Comments of the subjects are given along with the number used to identify them and with the number of the question to which they have responded.

Interviewer number 1's recordings:

101 Transfer of hours should be coordinated between universities. Feels it a problem when hours don't count at another school.
Feels college atmosphere more casual than when he was a youth; gone too casual in some instances.
36. Nearing retirement age.

102 Roles of U.: Respondent had some question that older people don't see university life as something to consider. Says her friends think it nice she goes but they couldn't or that she is strange to attend at her age.
Off-campus learning: More than exam should be considered.

103 36. Too old to be interested in full degree. Only classes pertaining to writing.
51. Getting this at bank where employed.
53. Help through emoloyment.
58. More creative writing classes.

104 One of the things I object to about night school is that the Oklahoma Daily is not made available to these students.
Institutional barriers: underlined "parking distance between classes".
Humanism/Altruism: "Terrible question".

106 36. "age"
68. "age"
75. Disinclination and preoccupation elsewhere.
Would not answer after this page (p. B.1), felt it should take consideration that could take part of a day to do properly. Also felt categories too broad.

107 Feels teachers are telling people how to do a job when the teacher has never done said job - only read about it.
Feels teachers bending too much toward making student happy.

108 Feels college not as structured as in 1930's. Prefers it as it was previously.
68. health and student activity fees.

109. 58. opportunity to participate in identifying own learning needs.
68. rigid system
75. full-time employment
Traditional Relig.: "unless this is the direction of choice."

110 62. would prefer 3 hr. session/wk. instead of 3/one hour sessions.
68. Student activity and health fees.

111 Dr. Jamison was interested in this study. Agreed to talk with Judy if she wants to call. Work no. 271-2233.

Interviewer number 2's recordings:

203 Questions irritating. Too many words and tries to be too learned. Questionnaire needs to be simplified. More simple breakdown of questions. Time would be better used if questions were easier to understand.

205 68. Evening classes not offered.
75. Lack of beginners information.
General comments: 1) lack of information for full-time evening students; 2) that special student credit does not apply to degree; 3) university did not inform you that illegally enrolled in some classes (i.e., subjects in major field - pass/fail); and 4) some parts of questionnaire were elusive. Overall good questionnaire. Negative toward university and treatment of senior learners. Special attention to senior learners-special classes for degree-oriented senior learners. Evening classes that are degree-oriented.

Interviewer number 3's recordings:

301 Freedom: Would agree highly on first part, but not on last part.

302 58. Accessability and opportunity to interact with knowledgeable people in my highly specialized field of interest, philosophy.
75/68. As a part-time commuter, I object to paying Goddard Center and student activity fees.
I have not filled out the section on Roles of the U. for this reason: I see the U. in terms of "academic development: and "intellectual orientation" to which I would assign a value of "5" But, I do not make the distinction based on age which you make.
Unless a student, regardless of age, is prepared to deal with learning on a U. level, that student should not be at O.U. This is to say that I do not favor watered-down courses, and that the "remedial work in basic skills" should be very limited. To put an unprepared (lacks basic skills) student in a univ. is to subject the student to great hardship. To reduce the level of instruction to match the unprepared student's capabilities is to devaluate the quality of the U. It seems to me that a Jr. College would be a more appropriate place for remedial instruction. Educational need items such as 49, 50, 51, 53, 54 could be met by the network of Jr. and Community Colleges in OK. (even banks offer 51). Technical schools, Y.W.C.A., and many churches offer courses in these areas. Further, the College of Cont. Ed. makes possible continuing education for those who wish to study at their own tempo and while remaining at home.
It does not appear to me that a U. which is qualified to grant graduate degrees should be undertaking instruction which is on a level such that it could be carried out by instits. and agencies throughout the state, at greater convenience and less cost to the student.
(The subject recorded this himself on the back of the schedule).

304 58. Opportunity to know how "slave people" feel and how you can best relate to them and how to break down racial barriers.
68. Closed classes
72. A 16 wk. sem. would be better-2 or 3 hours a wk.
Institutional Acc.: ?? a dirty word.

305 Off-Campus Learning: "during their U.G. years"

306 75. "I work too much."

307 Time constraints of full-time job.

308 66. underlined "parking".
68. cannot sit 3 hours in a class after a day's work. Classes should be 2 hours or less.

309 36. Only Fall, 1977. After that I'll rest awhile.
Not enough older folks go.
40. Very applicable.
41. Not applicable for me.
58. Keeping your mind active will keep you alert.
67. Purely personal - I am a counselor, yet I have run across this in counseling classes (i.e., restricted enrollment), but it does exist with 2 classes.
71 and 72. would be a "4" except for "religious work:
85. and 86. Social criticism/activism: Too much in the late 60's.

Interviewer number 4's recordings:

401 85. and 86. Social criticism/activism: Is it important for the univ. to assume this role in regards to the total pop. and/or people 55 and older?
97 and 98. Off-campus learning: more flexability in off-campus learning.

402 73. OCCE charges $50.00 for special seminars.
68. When univ. fails to replace a prof., resulting in the dropping of a course.

404 60. The easier you can make it for older people to get in, the better.
66. "parking" - underlined.
He read every question out loud and nit-picked about how these goals could be achieved. Drove me nuts!

405 They do not offer many courses in Latin American Studies which I intend to keep majoring in.

406 66. "parking!!"

I watched TV with her for 2 hours and talked about life and death. She taught me alot in 2 hours! Neat lady! Hates inheritance taxes. Refused to pay them, but finally gave in. Decided to get a degree since everyone else in her family has one including her grandmother who got a degree from Indiana Univ. in the 1800's. She reminded me of my grandmother also.

407 Weird lady...would not respond to freedom questions. Finally said she doesn't think Communists should be hired to teach because they preach their political views to a captive audience. Interviewed her over dinner at a restaurant. I made the mistake of ordering something to eat. Since I'm left-handed, I had to eat with the wrong hand, which is pretty tricky to do when you're uncoordinated!

408 Took me a year to find his house.

409 Neat lady! She came from NYC 3 yrs. ago and studied for 8 mos. to get her GED. Is now in college. We talked agout the state of NY and Harlem. She told me about her childhood there and about the racial mixture at the time. Talked about marriage and kids. Very "gung ho", optimistic lady. I loved the way she talked!

410 62. Wants classes in the early evening to get home before dark (before 7:00 PM).

Talked to her out in the car so the dogs wouldn't get me. She lives outside of Shawnee on a farm. Pretty interesting. Going to graduate school. Not much discussion since she had a church supper to go to. She loves OU and feels everyone has helped her there.

411 He looked up "egalitarianism" and also pointed out all the spelling and typing mistakes on the form. Very efficient accountant.

412 75. Business College is discouraging enrollemnt in night classes because they are on the verge of probation and are not being funded properly by the U. It is difficult to take a degree required course at night. Many of them aren't offered at all at night.

413 Educational need, others: Career oriented self-fulfillment.

Nice lady. She's 65 and is in law school. The only thing that bugs her is when people classify her in one age group and therefore make assumptions about her. She feels everyone's needs for recognition, love and self-worth are the same regardless of age.

414 65. Not irrelevant curriculum because you have a choice now.

They should have instructors in the Business College who have had real experience in the business world (running a business/their own!).

415 38 and 40. Ambiguous question.

Other educational needs: like to learn how to teach Journalism and English, Learn about practical discipline in teahhing classes.

64. Grades are a barrier to "peace of mind".

72. Ambiguous question.

74. The U. hasn't taught me how to teach.

416 He started off by saying that older people don't have degrees because the are products of the depression. There weren't any incentives for them.

58 and 59. Stay intellectually curious in the aging process. Accessibility to varied racial and cultural persons and situations. It is important not to limit yourself to one age group.

68. Limitation of specific courses offered in successive semesters.

70. Arthritis.

There needs to be more emphasis on cultural aspects rather than athletic. Emphasis on undergraduate rather than graduate student. Need an undergraduate library.

417 36. Since his GI Bill was running out, he decided he could put it to better use by going to a vo-tech school to be a mechanic.

66. "parking" - underlined. Had early morning classes and still couldn't find parking.

At the beginning of the section on roles of the university, he wanted me to note that higher education is ripping off the students.

75. and 76. Advanced Training: You can't stand still- you gotta keep going. The world keeps changing.

89. and 90. Democratic Governance: "Closed meetings".

Interviewer number 5's recordings:

501 60. Admission requirements not so bad now.

68. required courses.

70. deafness.

73. activities and health fees.

502 36. have to work while I go through school.

68. lack of financial aid or jobs - and class scheduling.

503 36. will enroll as an unclassified grad. student for pleasure and to keep French sharp.

58. Mechanical (AV) techniques of teaching. Many of these new things have come along since I was younger.

68. Rotation of courses.

75. Health fees, activities fees.

71. and 72. object to "religious heritage" - because of foreign students.

83. and 84. Social Edalitarianism: doesn't really believe in open admissions.

99. and 100: Institutional Accountabilty: some programs should be kept even if only a few students are enrolled.

505 68. language requirement.

506 36. "my wife"

68. inadequate instruction. Closed minded, book-oriented, lack practicality, and large classes.

507 36. No, going to France for a year.

58. miltigenerational "understanding", life cycle education and social change.

68. freshman Eng. composition.
75. health and activities fees. I was just scared when I started.

Interviewer number 6's recordings:

601 33. language and history
58. offer courses of general interest but not for credit.

604 33. Arts and Sciences requirements.
58. better publicity on special programs and campus activities such as plays, etc.
50. She thinks retirement planning could be sponsored by the U. but should come from the community.
63. Better publicity on special programs and activities.
69. This lady has a friend who is employed by U. of Mo. - she travels 6 mos. out of every year to teach communities how to work with older Americans.
73. Not enough curriculum.
General comment: Can't get a degree in Urban Studies without attending full time. She wants a degree but doesn't want to quit her full-time job.
When she didn't enroll this past semester, she received a letter from the Provost's Office asking why. She called the office and the secretary said, "oh she didn't send that, she just signed it - I'll direct you to someone else." She talked with 2 other people but recieved no satisfaction in that nobody seemed to know what to do with her reasons why.
Night school info. did not indicate where book store was located or its hours. No contact with anyone else in U. No school spirit or camaraderie in night classes.
Three friends wanted to attend night classes with her but couldn't find courses they liked.
Urban courses would like 3 hrs courses one morning or one afternoon rather than 3 times a week.
Unstructured special curriculum.
No phys. geopraphy courses at night.
Beef up night courses in Summer school.
Evening sessions - OU could provide transportation from Myriad for night classes. This would give people opportunity to meet and feel a part of the U. Would save gas and avoid bad weather driving.
Would like a report on the data gathered by questionnaire.

603 Would like an employment service to help them find jobs after they have taken refresher courses in their field. Or locate people who will take them on a apprentices.

605 Disappointed in rigidity of Business School, that is, no credit given for life experience.
60. Special admission time for senior students to avoid standing in line.
He thinks St. Luke's Methodist Church in OKC has an excellent adult education program.

613 62. She strongly resents having to pay for health and activities services which she has not used since 1938.

87. and 88. Too much for one question. Would answer different parts in different ways.

83. and 84. This need should be met in community colleges.

97. and 98. Too much for one question. Should be in 2 parts.