Articles

Older Adults in Lifelong Learning: Participation and Successful Aging

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ABSTRACT

This article examines the relationship between the participation of older adult learners in educational activities and successful aging. In partnership with seniors' organizations, focus-group interviews were conducted on seniors' involvement in learning and their perceptions of its influence on successful aging. Successful aging is defined in terms of health, life satisfaction and happiness, and physical and cognitive functioning (Menec, 2003). The study was exploratory, but the results suggest that participation in educational activities has positive effects on successful aging and potentially contributes to both physical and psychological well-being. Connections are also made to activity-theory studies (Menec, 2003), lifespan theory (Baltes, 1997; Heckhausen & Schulz, 1995), and adult education studies

RÉSUMÉ

Dans cet article, les auteurs examinent la relation entre la participation des apprenants adultes âgés aux activités éducatives et un vieillissement réussi. Par l'intermédiaire des partenariats avec des organismes pour personnes âgées, des entrevues furent faites auprès de groupes de consultation sur la participation des personnes âgées dans l'apprentissage, et les perceptions de ces dernières sur influence de celui-ci sur un vieillissement réussi. Le vieillissement réussi est défini par rapport à la santé, à la satisfaction de vivre et au contentement, ainsi qu'aux fonctionnements physique et cognitif (Menec, 2003). Cette étude fut exploratoire, mais les résultats suggèrent que la participation aux activités éducatives a des effets positifs sur un vieillissement réussi, et qu'elle contribue probablement au bien

on older adults (AARP Survey on Lifelong Learning, 2000; Thompson & Foth, 2002; Withnall, 2002). The authors conclude by suggesting a framework for thinking about older adults' participation in learning activities and successful aging.

être physique et psychologique. Les auteurs font aussi des liens aux études de la théorie de l'activité (Menec, 2003), la théorie de la duré de vie (Baltes, 1997 ; Heckhausen & Schultz, 1995), et les études en éducation aux adultes faites auprès des personnes âgées (AARP Survey on Lifelong Learning [Sondage AARP sur l'apprentissage continu], 2000 ; Thompson & Foth, 2002 ; Withnall, 2002). Les auteurs concluent en suggérant un cadre pour les idées sur la participation des personnes âgées aux activités d'apprentissage ainsi que sur un vieillissement réussi.

INTRODUCTION

The number of seniors in Canada is projected to increase from 4.2 million to 9.8 million between 2005 and 2036, and seniors' share of the population is expected to almost double (Turcotte & Schellenberg, 2007). Aging of the human society, therefore, will present one of the greatest social challenges of the 21st century if seniors do not remain actively engaged in our society. Participation in educational activities is often seen as inherently good, worthwhile, and critical to individual and societal success because it promotes intellectual, physical, emotional, and social well-being. Higher levels of educational attainment are often related to better individual outcomes in terms of employment, earnings, further learning, and longevity. Socioeconomic status, geographic location, age, and gender are among the factors that systematically influence life outcomes. Although seniors' organizations in Manitoba are considered to provide a variety of informal and non-formal learning opportunities, as well as cultural, recreational, and health-promotion programs, to a large number of basically active people who are retiring from the workforce (Fleming, 1986), the relationship of those opportunities and programs to successful aging has not been examined. The purpose of our study was to gain an understanding of how participation by older adult learners in educational activities relates to successful aging, which

Menec (2003) defined in terms of health, life satisfaction and happiness, and physical and cognitive function.

RELATED LITERATURE

Few studies have been done on older adult learners' participation in learning activities and successful aging. Rather, the claim was made that upon retirement from the workforce, older adults often disengage from life, address role loss, and adjust to role change (Cumming & Henry, 1961). Recently, scholars have indicated that retirement, age categorization, and disengagement are evolving and changing concepts because the average age of retirement has risen and older, healthy adults are more actively engage in life (Chappell, Novak, & Marshall, 2007). The few studies that have been done on older adult learning and successful aging suggest that while older adults confront barriers and motivational issues to participation in educational activities, their participation positively contributes to a good quality of life through physical, mental, and/or emotional health, well-being, and personal satisfaction (AARP Survey on Lifelong Learning, 2000; Glendenning, 2001; Novak & Campbell, 2001; Thompson & Foth, 2002; Withnall, 2002). In other words, the research suggests that participation in learning activities has a positive effect on successful aging, which is defined in terms of life satisfaction, happiness, and good physical and cognitive function (Baltes & Baltes, 1990; Baltes & Carstensen, 1996; Menec, 2003; Strawbridge & Wallhagen, 2003).

Participation and Successful Aging

Activity theory conceptualizes a positive relationship between activity and successful aging, whereby active participation in conjunction with the absence of disease and good physical and cognitive function are critical to successful aging. Active engagement is seen as productive, paid or unpaid activity that has a social value and maintains interpersonal relationships. Menec's (2003) longitudinal study examined the nature of everyday activities (i.e., social—visiting family and friends; solitary—collecting and hobbies; and productive—volunteer work, light housework, and gardening) as an ongoing process that benefits a wide range of domains in later life, including health, well-being, and physical and cognitive functioning. One conclusion of this study was that successful aging (the summary label used to refer to the outcomes of health, well-being, and physical and cognitive function) is not an outcome that characterizes those who have aged successfully but rather is part of an ongoing, lifelong process.

Lifespan theory, which concerns the ways in which people respond to age and changing social expectations (Levinson, 1978), suggests that for older people to progress, they must adjust to a number of factors, including

declining health and physical strength, retirement, reduced income, and death of spouse. This theory also provides some insight into the development processes that allow for successful adaptation to age-related losses (Baltes, 1997; Heckhausen & Schulz, 1995). Baltes's (1997) selection, optimization, and compensation model focuses on compensatory mechanisms that older adults use to achieve their goals when their old methods are no longer viable. Rothbaum, Weisz, and Snyder (1982) outlined a two-process model of perceived primary- and secondary-control strategies that individuals use to manage their lives. These strategies differ in substance and manifestation, allow personal control, operate independently, and/or complement each other for maximum results. Primary-control strategies that require effort, perseverance, and modification to one's approach allow individuals to change their environment to reduce pain and enhance reward. In contrast, secondary-control strategies allow individuals to modify their beliefs, values, and goals to fit their environment (Weisz, McCabe, & Dennig, 1994).

Menec (2003) agreed that respondents used compensatory methods to maintain their psychological well-being in the face of age-related losses. She concluded that life satisfaction and activity are significantly related, although life satisfaction may be seen as a precursor rather than a consequence of activity and the benefits of activity are not direct but mediated by context and self-concept. Menec's study did not focus on educational activities per se, but it did suggest that although activity levels and function declined with age, older age is not necessarily linked to less happiness. Even though greater activity is seen as related to greater well-being, it is also related to reduced functional decline and reduced mortality. Older adults, however, experience barriers and motivational issues to participation in all activities, including learning activities.

Understanding participation requires an examination of the multi-dimensional concept of barriers (Scanlan, 1986). While Houle's (1961) three-way typology (expanded by Boshier, 1971, and Rubenson, 1977) of goal, activity, and knowledge for participating in educational activities is instructive, Cross's (1981) framework of participation, which includes barriers and motivation, may be a helpful tool for conceptualizing the broader concept of participation, as it draws on both achievement and attribution theories of motivation to explain the decision to participate (Pintrich & Schunk, 1996; Svinicki, 2000). Cross-categorized barriers that adults encounter are dispositional, situational, or institutional. Dispositional barriers include lack of confidence and self-doubt in skills and abilities; situational barriers include lack of finances; and institutional barriers include lack of access to information and costs of programs. Efforts to encourage participation normally begin with the removal of barriers and the provision of opportunities. Institutional responses, however, have typically focused on increasing opportunities

without the necessary removal of obstacles and, as a result, these efforts have done little for disadvantaged groups, including older adults. Other studies (Beder, 1991; Cervero & Kirkpatrick, 1990; Man, 2004; Quigley, 1990) offer a sociological or structural approach to challenges that inhibit participation and integration and suggest the need for structural change and community-based empowerment to increase access, participation, and success for disadvantaged groups.

Overall, there remains relatively little research on older adults who participate in educational activities, little information on the characteristics of successful aging, and little or no evidence to support the benefits of learning activities for successful aging (see Schuller & Bostyn, 1992; Sloane-Seale & Kops, 2004; 2007). Our goals for this study were to contribute to the knowledge of older adult learners, provide an understanding of the nature of their participation, and examine the relationship between learning activities and successful aging.

THE STUDY

In partnership with five seniors' organizations in Manitoba, this study examined the perceptions of older adults who were members of these respective organizations. Focus-group interviews explored a number of issues, including motivation and barriers to learning, learning preferences, and characteristics of successful aging. For the purpose of this article, successful aging is the label used to refer to the outcomes of health, life satisfaction and happiness, and physical and cognitive function, as defined by Menec (2003).

Method

Qualitative methodology, including content analysis (Corbin & Strauss, 1990; Creswell, 1998; Franklin, 1996; Lincoln & Guba, 1985; McCracken, 1988; Tutty, Rothery, & Grinnell, 1996), was used to explore respondents' backgrounds and experiences, to gain an understanding of their involvement in learning activities, and to gather their perceptions of well-being. Five focus-group interviews were employed to create a process of sharing and comparing among participants, collect in-depth data, and inform the development of survey questions for a later study. In addition to the content of the conversations, the group dynamics served as a source of information. A standard protocol for moderating and recording was developed and used (Einsiedel, Brown, & Ross, 1996). With informed consent from participants, focus groups were conducted over a two-month period, commencing in late fall 2006. Focus-group interviews of approximately 90 minutes were facilitated by the researchers and audiotaped. Audio tapes were transcribed to facilitate

the analysis of the data. As well, demographic data were collected using a post-interview questionnaire. Confidentiality of participants was assured.

Population and Sample

A purposeful sampling technique was employed to ensure that there was variation among the focus-group participants. The selection criteria were age, geographic location, education, and gender. Focus-group participants were drawn from seniors' organizations (three in Winnipeg and two in rural Manitoba) that provided continuing education for older adults. In the early fall of 2006, an invitational letter describing the rationale, purpose, and focus-group process was distributed at selected classes at these centres. Those who agreed to participate returned their consent forms to the researchers, who then contacted those respondents to determine diversity and set up the focus-group interviews. Thirty-eight people agreed to participate (6 males and 32 females). Details of the focus-group process were provided to the selected participants. No characteristics made the candidates vulnerable or required extra measures.

Data Analysis

Data were collected through a semi-structured, focused-interview process. The focus groups allowed for probing and redirecting information, as well as for the collection of rich, thick data. Data collection and analysis were inter-twined and ongoing throughout the research process. Transcripts were ana-lyzed individually and collectively, using a horizontal and vertical content-analysis process, to confirm and refute categories and to develop themes and patterns. Provisional interpretations and categories were identified by matching related concepts, observations, events, and activities. Categories were then confirmed, refuted, or expanded in subsequent discussions between researchers. Validity was attained through triangulation of data, that is, by debriefing of researchers after each focus group, independently identifying and cross-checking categories between researchers, and main-taining and reflecting on the field notes kept during the research process (Corbin & Strauss, 1990; Lincoln & Guba, 1985).

FINDINGS

The analysis is divided into three interrelated sections that parallel the focus-group interview guide, specifically: 1) demographics; 2) motivation, barriers, and learning preferences; and 3) successful aging and education. Excerpts from selected participants are used to illustrate the themes that emerged from the data.

Section 1: Demographics

Of the 38 individuals who participated in the focus-group interviews, the majority were urban (24) and female (32). The majority (79%) were in the "young-old" (65–79 years) category (13% were 65–67; 24% were 68–73; and 42% were 74–79), versus the "old-old" (80+ years) category (13%). Although all but one had been married, 42% were still married and living with a spouse, while more than half (58%) were single and living alone.

The majority (63%) had completed post-secondary education, but urban participants (78%) tended to have a higher level of education than rural participants. However, differences were also noted between and within groups, depending on the area the participants were from and its distance from the city. Participants from two upper-middle-class areas in the city had higher levels of education (89% and 87%, respectively) than those from the lower-middle-class area who had completed some post-secondary education (57%). For the rural areas, participants from the area located closer to the city had higher levels of education (40%) than those living farther away (33%).

With respect to overall health and well-being, the majority (82%) had few physical difficulties; of these participants, the majority (92%) described their general health as good (60%) or excellent (32%) and described themselves as usually happy and interested in life (87%), while only 3% said the opposite. This 92% majority also indicated they were very satisfied (45%) or satisfied (47%) with their life; no one indicated being unsatisfied with their life. Most of these participants engaged in a wide range of activities, such as curling, swimming, volunteering, reading, writing, or taking classes, describing themselves as very active (74%) or active (26%). The sample split evenly into those who spent three hours or less versus four hours or more on learning activities per week. They characterized themselves as either "go-go," active in their retirement (71%), "slow-go," their pace of life had slowed down (26%), or "no-go," their failing health made activities difficult and medical treatment had become a defining characteristic of their life (3%).

Section 2: Motivation, Barriers, and Learning Preferences

Participants were asked questions related to continuing education activities, including motivation and barriers for participation and their learning preferences and resources.

Motivation for Participation

Participants provided a number of interrelated reasons for taking part in continuing education activities. To learn for the sake of learning, to socialize, and to achieve a goal were the major themes that emerged.

1) Learning for the sake of learning

Gaining knowledge for its own sake emerged across all five focus groups. Participants indicated that they took part in learning activities because they had an appetite or thirst for knowledge or they had an inner drive for knowledge and intellectual stimulation. They wanted to learn for the mere pleasure of learning. Some expressed their motivation for learning in these ways:

> *The more you learn the more you want to learn. That is really what it amounts to. You have an insatiable appetite for learning after you start learning . . . Whatever lights your fire . . . it is an inner drive. (SJ, p. 22)*

> *It is the most exciting thing. I have never ever wanted to stop learning. I am just one of these people who read eclectically. You could show me the sewer system . . . and I would start reading that. I have a bug. It seems that I am interested in everything . . . So what I am saying is I think older people are like that and once they get this little spark in their brain and they start, they can't stop. They just want to continue all the time. And it makes life so much more interesting. (SJ, pp. 7–8)*

2) Socializing

The majority agreed that they participated to socialize, specifically, to be part of a larger community, find emotional supports, form friendships, meet new people, and feel at home in the group. Participants' views on socializing included:

> *Also it is always very interesting to meet new people . . . I have many friends, very interesting friends, very different friends and we have a great time together and here at the centre there are a lot of people who are friends but you don't spend a lot of time with them except at the centre. I am very interested in meeting new and different people. (SJ, p. 6)*

> *I think it is who you are learning with. If you have a nice group of people that you enjoy being with . . . it is easy to get along, and to be working with a bunch of people that you work well with. (M, p. 1)*

3) Achieving a goal

Most participants attended learning activities to achieve specific goals. They did not, however, participate to get a credential but rather to use their mental (and physical) abilities while learning about specific issues, such as health or world issues. One person outlined their reasons this way:

> *… I take a few vitamins but I am also interested in finding out all I can about them. I keep my eyes peeled about vegetables and certain vitamins . . . I have a lot more interest in health issues when I hear them talking on the television and radio. (M, p. 3)*

Barriers to Learning

Participants identified a number of interrelated barriers to their participation in educational activities that fit into situational, dispositional, institutional, and systemic categories.

1) Situational barriers

   Situational barriers are conditions that limit participation, in this case, conditions such as time, money, location, convenience, transportation, and mobility. As some participants stated:

   > *Distance . . . as mentioned not being able to drive. Transportation is always an issue here . . . we really don't have buses. We get the handy van though, and the taxi cabs are quite available to get you from Point A to B. (P, p. 11)*

   > *. . . here are all kinds of other things but it is sometimes the money too . . . If you are living on a fixed income you can't always afford to go to four or five activities. You can't do it . . . Some things are fairly expensive. Some of the courses in the guide are fairly expensive, compared to a course here. Our computer course is . . . $35 or $40 for eight weeks . . . You pick up the magazine and it is $175 for the same thing. (GN, p. 5)*

2) Dispositional barriers

   Dispositional barriers relate to personal attributes and abilities, such as a negative attitude, fear, pride, or lack of self-confidence, that prevent participation. These two participants concurred on:

   > *I think . . . lack of self-confidence, which is true for a lot of people . . . Nobody wants to make a fool of him- or herself. (P, p. 11)*

   > *I found that taking evening classes . . . can be a little bit scary, and I have had occasions to be scared. When I have gone to the UM . . . in the evening I have not had that feeling of being threatened. I am smart enough to keep my eyes opened because you never know . . . It is something that people are aware of but people avoid doing things that won't be safe, going into areas, being alone in areas where you don't feel comfortable . . . Whether you are safe or not, the question is whether you are comfortable or not. (CR, p. 8)*

3) Institutional barriers

   Institutional barriers relate to the requirements of an institution that inhibit participation. For the study participants, these barriers were lack of adequate parking, program costs, inaccessible buildings, and lack of information about program availability. Participants offered these comments:

   > *I think some things you want to learn but you can't because of the logistics such as parking and accessibility. Senior centres that are attached to centres like this or a residential area but forget the parking. When you get the flyer*

from a [centre] that lists all the things you can do, places you can do them in, and if you have the desire to do them, the logistics of getting to them, or parking when you get there, or whatever is a problem . . . (GN, p. 5)

I had to pay $300 for a computer course where I learned nothing because it was all dedicated towards getting certificates for young people who were going to work. [Instead] I came here [seniors' centre], felt comfortable, and the price was right. (CR, p. 9)

4) Systemic barriers

Systemic barriers, such as gender, age, geographic location, and politics of educational cost, prevent participation. Participants provided some examples:

It is costly particularly for rural students to go to university. If you are in the city, you pay your tuition fees, and maybe your bus pass. When you live out here, you pay thousands of dollars a year for a place to live, food, and then your tuition. So it is extremely costly for rural people to get any kind of education where you are not thousands and thousands of dollars in debt. (P, p. 12)

But as I said being as adventurous as I have always been from childhood on, probably I would like to take safe risks but they are still risks. I think not wanting to let other people worry about where I am going so half the time I tell them this is where I am going, but generally I am off the beaten track. So I think that can be a limiting factor as well. (SJ, p. 23)

Learning Preferences

Participants were asked to describe the ways in which they learn best and the resources they used most. Experiential (hands-on) learning, content/instructor-centred learning, and self- and learner-directed learning were the three major themes that emerged from the data.

1) Experiential learning

Experiential learning refers to practical, hands-on, learning-by-doing and interactive modes of learning. The majority of participants indicated that this was their learning preference. Two of them stated:

Group discussion is the only way to go but . . . you need a leader, a group leader . . . I think it is probably true, hands-on; something has to be hands-on with me. Someone has to show me how to do it and I do it over, and over again. (M, p. 9)

Mostly in a group, but if the instructor can't help you because she is very busy, you have another person next to you who you can ask that one little, important question. You are beside that person, she will answer you, and then it opens up, that much of the program that you are trying to learn,

and then you can move on. You get a different slant when there are more people . . . When you are in a group, someone will ask questions that maybe you haven't thought about so then you learn something from that. (GN, p. 16)

2) Content/instructor-centred learning

Content/instructor-centred learning is a preference for learning specific topics from content experts. Some participants referred to this as the traditional manner; in other words, they wanted a knowledgeable instructor to teach them specific content. However, they also wanted the opportunity to discuss and interact with others. For instance, some commented:

… I enjoy a reading course . . . listening to a professor who inspires enthusiasm for the content and is able to match content and teaching style . . . or can make me learn more because the lecture covers the content and there are handouts . . . or someone who has the knowledge and expertise in the field . . . and is a great communicator and teacher . . . (CR, p. 11)

I would like to add that I enjoy lectures a lot. Illustrated lectures are even better but I think that is really nice to be able to sit afterwards with the group of people who have been at that lecture to get feedback. What did you think of it? Did something challenge you? I mean it just depends on what the topic is how far afield your discussion would go. (CR, p. 13)

3) Self- and learner-directed learning

Self- and learner-directed learning refers to individuals' preference for directing and taking charge of their learning. For the study participants, this included wanting to find out for themselves, figuring something out for themselves, and trying something on their own. Some indicated:

Sometimes you just run out of time. I couldn't take bridge lessons because I was in this group, so I got this book, and I forced myself to learn it . . . I have something to add to that. A lot of the computer things I have learned not by doing the course because I have got the computer. If I want to find out, I just do it. It is a challenge also to try and find out the answers for myself . . . I do that . . . I use the library catalogue online . . . I learn from books. (CR, p. 12)

… I do a lot of knitting. I make a mistake, I want to be able to undo it, and do it properly. You know what I mean; learn by mistakes. Yes, if I am serious about learning something I like to try it on my own. So, if I make a mistake I can erase it. If I am on the computer and I make mistakes, I can delete the whole thing and start over again. (M, p. 9)

Learning Resources

Participants were asked about their learning-resource preferences and the value of post-secondary educational activities to them. The data were sorted into three interrelated themes of non-formal, informal, and formal learning resources.

1) Non-formal learning resources

   Non-formal learning resources refer to organizations and/or groups that participants used to facilitate their learning and whose main priority is not the provision of educational activities. These included seniors' centres, churches, libraries, museums, art galleries, and legions. Participants' comments included:

   > *It is organized. I also go to a lot of other lectures. I go to things through the church . . . I don't have them in front of me to say now I am going to choose this, this, and that. I go to them when they come but I don't know ahead of time, whereas at the centre you have the calendar, you can look at it, and pick what you want . . . You also know the setting that you are going to. (CR, p. 15)*

   > *When we go to the centre to these various things, there is a comfort level of knowing that you are going there. You are going to be with this group, you get distinct information as to where to meet, and where to park . . . I think that helps a great deal. So if you are taking a course there and you stumble through the first couple of visits, then after that you have that comfort level. (CR, p. 17)*

2) Informal learning resources

   Informal learning resources are aids to learning. The aids used by participants in this study included the Internet, radio, libraries, newspapers, books, and magazines. Two participants described their informal learning in these ways:

   > *I spend a lot of time at the library. I don't have a computer and I can go there to search out a book . . . I used to spend time at the library in the city on a regular basis because I lived there at one time. I used to go to the main library downtown, perhaps when I needed to look something up, until they decided to reconstruct the place. It is opened again and maybe I will get back to that . . . (M, p. 12)*

   > *The one thing about the centre, if you have an interest in gardening and you live out of town, very often people . . . share their knowledge with other people who have similar interests but don't know where to start . . . I have been out with overheads and slides . . . you can draw other people in with the same interests and this centre is a very good example of that because if you have a talent that you want to share, you are more than*

> *welcome to offer it here. I needed somebody to come and bicycle with, so I ran a bicycle group and it was quite successful. (GN, p. 19)*

3) Formal learning resources

Formal learning resources refer to learning opportunities located within institutions with a mandate to provide education. In this study, these included programs for seniors offered in school divisions, colleges, and universities. Some participants indicated:

> *I think if you are open to formal learning, then you would be more open [to learning]. You have a mindset so you will learn in other circumstances just because it is the way your brain works. (CR, p. 16)*

> *… Classes at the university, community colleges, or the school division keep you vibrant. If you had to live only with older people, only play bridge, and talk about the grandchildren, it would be dreadful. That would be worse than Hell for me, but to talk and learn at the same time is so fulfilling it is self-evident that you are still alive . . . I think the fact you are going to classes at the University and interacting with different age groups is really important in my opinion. (SJ, p. 28)*

Section 3: Successful Aging and Education

Participants were asked about the characteristics of successful aging, that is, the activities that had the greatest impact on successful aging and their goals for successful aging. In addition, they were asked to discuss the role of continuing education in successful aging. Although the particular perspectives of participants varied, a number of themes emerged.

Characteristics of Successful Aging

Active lifestyle, social connectivity, self connectivity, personal resources, adaptability and flexibility, spiritual connectivity, and future connectivity were the major interrelated themes that emerged from the data related to characteristics of successful aging.

1) Active lifestyle

An active lifestyle includes both physical and mental activities. Participants indicated that successful aging related to a range of physical and mental activities in which they participated, including cycling, jogging, and fitness activities. Mentally stimulating activities included doing puzzles, attending and facilitating classes, watching educational television, conducting research on the Internet and at the library, and being an active volunteer. Participants described active physical and mental lifestyles in these ways:

I can't stand inactivity. It is boring. I like to read and I can read for hours but I guess it isn't seen as an activity just to read. There are some people I know that do nothing and don't think about anything. That is their daily routine. I can last half a day if I am really sick . . . On the other hand, I have to be active. I have to use my brain and my body and be involved with people. I can do that. I like the activity of interaction. (CR, p. 4)

You keep your mind active because as a senior if you don't use it, you lose it. And it [learning] keeps you interested in the world around you and even though I am the age I am, I am still taking classes because I think that learning is a continual process. It is very important to keep your mind active—learning and keeping yourself busy—that is the one thing about doing Tai Chi or line dancing, you don't think about anything else when you do this because you are concentrating so much on the next move. You are learning and relaxing at the same time. (P, p. 24)

I learn from other people. Someone mentioned volunteerism and that is huge. I have stepped outside of my comfort zone by volunteer experience. I think probably I have learned more through those experiences than I have from books. I jump to the [Inter]net too, if I want a quick answer or some-thing that I need. I would do that but I think that in the sense of my life, I have grown through volunteerism. (CR, p. 19)

2) Social connectivity

Social connectivity refers to connecting emotionally and physically with others—family, friends, and community. Participants believed that social connectivity resulted, in part, from participation in edu-cational activities and events. They also considered developing and maintaining a social support system to be very important to successful aging, in particular, having lots of friends, maintaining strong family units, connecting with a community, volunteering in the community, and making intergenerational connections. Participants offered these examples of social connectivity:

And I think that family is supportive. A support system whether it is family or not. Like I have very little family here but I have a good support system. So I think family is great but if you don't have it, you have to have that other support system. (CR, p. 26)

Very important to me [is family] and friends. I think I would fold up and die if I didn't have my friends. I am very fortunate, I consider myself fortu-nate. My health sometimes is not good and I find my friends to be a great support to me. (SJ, p. 33)

3) Self connectivity

Self connectivity appears to consist of a number of components: self-care, self-knowledge, and self-determination. Overall, participants indicated that a strong sense of self is important to successful aging and to maintaining a good sense of well-being. More specific examples included being aware of your needs, being able to live alone and look after your home and property, feeling fit, and doing everyday things, like driving a car or doing laundry. Participants described self connectivity in these ways:

> *One thing I have to realize . . . I am slowing down and I have to admit it and I have always been sort of hyperactive and on the go, go, go. But when I do it now, I play myself out. I get to the point of exhaustion where I sometimes have to take a few days off to catch myself… I have to be aware of my limitations and I have to admit to myself that I am slowing down. I cannot do this, this, this all in the same day. I have to think it out a bit. (SJ, p. 35)*

> *You have to believe in yourself—no matter what you do, you have to believe in yourself . . . if you want something badly enough, you will do the best you can to do it, and if you cannot then you have the guts to say I cannot do it. Listen to yourself. (P, p. 2)*

4) Personal resources

Personal resources refer to both internal and external resources, including individual attributes, capabilities, and resources. For the study participants, internal resources were the personal psychological attributes that formed their personality (e.g., a positive attitude and a perceived internal locus of control), and external resources were those that were physical and acquired (e.g., disabilities, educational level, class, or finances). Participants agreed that resources contributed significantly to successful aging and that people who had characteristics such as curiosity, an interest in life, independence, and a sense of humour were most likely to age well. At the same time, participants recognized that physical attributes, such as good physical health, and sufficient financial resources went a long way in determining successful aging. They recognized that they were middle class and had the resources at their disposal to lead comfortable lifestyles. They spoke of personal resources in these ways:

> *I think a positive attitude versus a negative one [is important]. No matter what happens, there is always something that is good about it. So if you want to dwell on the negative you can, or you can think about the positive and stay positive. (P, p. 24)*

> *I think having an outgoing personality is a big factor—getting involved, not staying at home, sitting in your chair, and grumbling about*

everything. I think being an outgoing person and getting involved [is an important characteristic of successful aging]. (M, p. 21)

5) Adaptability and flexibility

Adaptability and flexibility were often mentioned by participants as characteristics of successful aging. Although both these factors fit within the category of personal resources, it seemed important for participants to comment on them separately. Participants agreed that a key characteristic of successful aging is the ability to adapt to life changes, including life-changing events such as the death of a spouse or physical decline. Participants described adaptability and flexibility in different ways:

… maybe adaptability because many seniors end up without a husband or wife . . . or maybe they have to look after their partner for years and their whole life has to change in an instant. You often hear of people who . . . have been hit with something unexpected, whether it is death or a difficult thing, and they give up because they are not adaptable. (CR, p. 25)

I think that [it is] appreciating that every day is a gift. Being able to recognize opportunities that come and be flexible enough in order to keep moving and you don't want to stop. Just keep moving toward what you want to do. Change your course if need be and be happy with the fact that you are able to do it. (SJ, p. 42)

6) Spiritual connectivity

Spiritual connectivity encompasses making sense of life in the larger context of the world and beyond. In some instances, participants related this to religious experiences and activities, but not necessarily. A number of participants were engaged in writing their memoirs, journaling and reflecting on their life, and considering how to make sense of their life within the larger society. More specifically, participants talked about striving for personal and private renewal, connecting to nature and the larger "picture," knowing themselves and their place in the universe, and having faith in and love of self and life. One participant clearly articulated the importance of spiritual connectivity in this way:

When I go cycling with my group, that is what raises my spirits—that stimulates my soul and I just feel like I am on some really good drug . . . Spirituality sometimes really helps because it isn't just about religion— but it does not have to be—it can be spirit, it's the whole encompassing umbrella of spirit that is really necessary in my life, as well as activities in mind, body, and family, of course. (SJ, p. 33)

7) Future connectivity

Future connectivity involves setting goals in retirement in order to age successfully. Participants stressed the importance of this, and many of the goals they identified were consistent with the characteristics of successful aging, for example, staying physically and mentally fit, developing social supports, adapting to life transitions, and practising self-care. Participants described future connectivity in these ways:

> *And I still set goals. I think if you have no goals, I don't mean big goals but little things—for example, tap dancing . . .hought when I retire I am going to do it because as a child we didn't have money or whatever, so that was a little goal. It isn't for everybody and it is something that I want. So it was a little goal. (SJ, p. 34)*

> *So I put that into my game plan and next year I am planning to hike in Peru. So I started to get fit for that and I also need a bit of Spanish, so hence last year I started taking Spanish, because I want the whole experience. I want it all, so one thing is leading to another. (CR, p. 6)*

Continuing Education and Successful Aging

Participants were asked to comment on continuing education and successful aging. In general, their feedback fits with the characteristics of successful aging discussed in the previous section. Participants specifically linked participation in educational activities and well-being, suggesting that educational activity stimulated mental activity, provided opportunities for physical activity, offered a sense of satisfaction and achievement, opened up new opportunities for learning and friendships, and provided information on healthy living. Participants' comments on education and well-being included:

> *I think that there was a time when you went to the doctor, you got pills, and you took them. Now you want to know why, what they are doing, and what are the side effects? You want to know more about why you are taking these medicines. (M, p. 3)*

> *You have got to keep physically active and you have to keep mentally active, and continuing education keeps the mental side [active]—exercising does the physical side—so it is of equal importance. (M, p. 27)*

DISCUSSION

It is important for educators, practitioners, and educational providers to understand the experiences of older adults. The experiences shared by the participants in our study provide insights into their learning activities, learning preferences, health and well-being, and what they view as the

characteristics of successful aging. A number of observations about demographics, learning experiences, and successful aging with respect to their participation in educational activities can be made from these data. As well, a framework has emerged for thinking about how the participation of older adults in educational activities relates to successful aging.

Demographics

The majority of the study participants were active, educated (i.e., had completed post-secondary education) women in good health, although the urban participants tended to have a higher level of education than those who had lived in rural areas their entire lives. (This difference may be attributed to accessibility and the delivery cost associated with offering educational programs in rural areas.) Their educational background appears to have led these older adult learners to put a high value on educational activities that are relevant, meaningful, and mentally and physically challenging. These factors are consistent with their portrayal in the literature, where those with high levels of education tend to have high levels of participation in continuing education activities, high economic achievement, and high socio-economic status. Furthermore, more women than men continue to participate in educational activities.

These older adult participants also appeared to be self-sufficient, that is, they could afford to pay for their educational activities, although they did not want to spend more than necessary, as they were probably on fixed incomes, and they wanted fair value for their money. They were active and healthy, having described their general health as good or excellent. The majority indicated they were also happy, interested in life, very satisfied or satisfied with their lives, and very engaged in a wide variety of activities. Our study data on active older adults were consistent with the picture presented of active, older adults in the related literature (AARP Survey on Lifelong Learning, 2000; Thompson & Foth, 2002), particularly with reference to the aging baby-boom generation, who are reported to be active, healthy, educated, and wealthy. Furthermore, according to the literature, increased education leads to increased participation in all activities, including educational activities, and improvements in mental, spiritual, and physical well-being (Ebersole & Hess, 1990).

Motivation, Barriers, and Learning Preferences

The themes that emerged from the data related to motivation, barriers, and learning preferences and resources were also consistent with the literature (Boshier, 1971; Cross, 1981; Houle, 1961; Rubenson, 1997). Study participants wanted to gain knowledge for its own sake and professed to have an appetite or thirst for knowledge. They perceived learning as a social event, in

which they participated both to socialize with their friends and peers and to meet new people and form new relationships. They also engaged in learning that was relevant and useful to their daily living, taught by expert teachers, which allowed them to pursue their goal of successful aging.

Their participation in all activities, including educational activities, appeared to be not only goal-activity-knowledge oriented but also part of a fundamental, ongoing lifelong process related to and benefiting their well-being and physical and mental health, rather than simply an outcome of successful aging (Menec, 2003). Participation in educational activities may be seen as a proxy for everyday activities because learning and its resulting benefits appear to underpin all their activities.

However, these older learners also experienced a number of interrelated barriers to their participation in educational activities that are consistent with those described earlier, including institutional, dispositional, situational, and systemic barriers. Situational barriers faced by participants included time, money, location, mobility, and logistics; dispositional factors were personal attributes and abilities that inhibited their participation; institutional barriers related to lack of parking and program information, cost of programs, and inaccessible locations; and systemic barriers, which are not discussed in the literature, included gender, age, geographic location, and the politics of educational delivery. For the majority of the participants who had lived their entire lives in rural areas, systemic barriers may have compounded their situation because of the mediating, cumulative, and long-term effects of their choices and decisions. Overall, the participants in this study who lived in the rural areas tended to have lower levels of educational achievement than those who lived in the urban areas. Although the politics of educational costs and program delivery may have influenced their social reality and participation, their life satisfaction, happiness, and function appear to be precursors rather than consequences of participation in educational activities (Menec, 2003).

With respect to participants' learning resources and preferences, their responses were consistent with the adult learning literature (Knowles, 1980; Merriam & Caffarella, 1999), and their suggested preferences for program attributes related to conditions for learning, process, content, and context. These older adult learners preferred challenging, experiential educational activities that were practical, hands-on, and interactive. They also wanted to learn content, from content experts, that was relevant and useful to them and reflected the larger issues in their community and the world. They did not want examinations, tests, certificates, degrees, and lecture formats; instead, they wanted opportunities for group discussions and interaction and peer learning. They did not want threatening classrooms that cause shame and fear but wanted to be valued and to build their self-confidence

and self-esteem through sharing their knowledge and expertise. They wanted learning activities that were accessible, convenient, and provided value for money. Many preferred to be self-directed in their learning—taking charge of their learning, figuring out the problem, making mistakes, and finding the solutions and applying them.

For these older adult learners, learning resources, as well as the definition of education, seemed to be broad, inclusive, and encompassing. They learned in a variety of settings, including non-formal, informal, and formal. Besides learning from specific educational activities, settings, and resources, they also learned from daily activities (Menec, 2003). These learners may be described as lifelong learners because they believe that you never stop learning. Their volunteer activities or civic engagement were as important as classroom activities because these gave their lives meaning and provided learning opportunities. These findings are consistent with Menec's (2003) view that the benefits of these learning opportunities are not direct but rather mediated by older adult learners' context and their self-concept. These findings suggest directions for educational providers.

Successful Aging and Education

The general themes outlined in the reviewed literature on successful aging focus on adjustment to changing roles of older adulthood, including activity theory and locus of control. In order to age successfully, older adults must be able to deal effectively with changing roles, particularly as they move from work to retirement (AARP Survey on Lifelong Learning, 2000). According to activity theory, greater participation in everyday activities increases the chance of successful aging (Menec, 2003). The research on locus of control (Menec & Chipperfield, 1997a; 1997b) suggests that older adults adjust to life changes better when they have a greater sense of internal control.

Our study data fit with and build on the themes discussed in the literature. As noted earlier, participation in educational activities has a positive relationship with successful aging, and participants in our study confirmed this connection. The active-lifestyle theme most readily connects to the notion of activity and successful aging. As well, social connectivity fits with the idea of "active engagement" discussed by Menec (2003), which includes the maintenance of interpersonal relationships. As described earlier, study participants stressed the importance of establishing and maintaining connections with family and friends for successful aging, as well as the importance of adaptability and flexibility, which fits with the notion of compensatory mechanisms outlined in lifespan research (Baltes, 1997), whereby older adults consider alternative approaches to accomplish things. For example, physical disability may require an older adult to do less of or to discontinue an activity. The participants' themes of self and future connectivity and

personal resources also related closely to and expanded on this concept and, even more specifically, to the idea of an internal locus of control, as discussed by Menec and Chipperfield (1997a; 1997b).

The view of participants that a strong sense of self is important to successful aging coincided with the concept of maintaining a perception of an internal locus of control, which is important to a sense of well-being. Future connectivity strengthens the sense of inner control because the individual sets a course of action for life as an older adult. Similarly, personal resources contribute to the sense of having control over one's life, while internal resources contribute to a person's sense of well-being and fit with the idea of maintaining an inner sense of control. The themes of self and future connectivity were consistent with what has been discovered as being meaningful to successful aging. As well, the idea of maintaining self-control fits with primary and secondary compensatory-control strategies discussed by Chipperfield, Perry, and Menec (1999). Although participants discussed both of these strategies in terms of adaptability and flexibility, secondary-control strategies are more prominent in later life because individuals lose their ability to enact primary controls to compensate for a change in condition.

Finally, the themes related to successful aging and education that emerged from the study data build on and are consistent with the literature (Baltes, 1997; Chipperfield, Perry, & Menec, 1999; Menec, 2003). In addition to identifying activity, adaptability, and attitude (Menec's 3As of successful aging), the participants identified other factors that influence successful aging, including spiritual connectivity, social connectivity, self connectivity, personal resources, and planning. These factors appear to be part of a process of lifelong learning, with benefits to well-being, rather than an outcome of having aged successfully (Menec, 2003).

Conclusion

Although our study was exploratory in nature, our findings may be of interest to educators, practitioners, and educational providers. The data not only suggest that older adult learners' participation in educational activities contributes to successful aging; they also fit with activity theory, lifespan theory, and adult education studies on older adults and offer suggestions for further research on the links between educational activities, successful aging, and continuing education program models. In terms of successful aging and education, the findings connect both to Menec's 3As of successful aging (activity, adaptability, and attitude) and to the factors of spiritual, social, self, and future connectivity. These characteristics of successful aging should be understood as a fundamental process, not as an outcome of participation in educational activities, with benefits to well-being. In short, they

are precursors to successful aging that are acquired and developed over a lifespan and facilitate successful aging.

In addition, attributes of successful program models for older adult learners may build on adult learning principles and theory (Knowles, 1980; Merriam & Caffarella, 1991) that attend to the removal of obstacles; address learning conditions, process, context, and content factors to increase participation; and improve older adult learners' overall quality of life and well-being. Although mainly retired from the workforce, older adult learners are active, engaged, lifelong learners, with critical thinking skills, and are competent at self-directed learning.

Overall, the study findings are aligned with and build on what was found in the related literature, which bodes well for continuing the research. Such research could seek to more broadly establish the relationship of educational activity to successful aging, to determine whether different forms and amounts of learning activity have different impacts on successful aging, to clarify the characteristics of successful aging, and to identify the forms of compensatory-control strategies used by older adult learners.

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