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A CONSTRUCTION OF TWELVE LIFELONG LEARNERS' PERSPECTIVES: AN
IN-DEPTH, NATURALISTIC STUDY OF SELF-INTEGRATION OF LEARNING

by

Marvin L. Hunt

A DISSERTATION

Presented to the Faculty of
The Graduate College at the University of Nebraska
In Partial Fulfillment of Requirements
For the Degree of Doctor of Philosophy

Major: Educational Studies
Under the Supervision of Professor James O'Hanlon

Lincoln, Nebraska

December, 2006

A CONSTRUCTION OF TWELVE LIFELONG LEARNERS' PERSPECTIVES: AN
IN-DEPTH, NATURALISTIC STUDY OF SELF-INTEGRATION OF LEARNING

Marvin L. Hunt, Ph.D.

University of Nebraska, 2006

Advisor: James O'Hanlon

This research focuses on understanding people who have chosen to learn throughout their lives. A broad question guided this investigation: What is the rich, lived, lifelong learning experience from the individual's perspective? This question allowed each participant freedom to explore and define issues he/she considered important relative to lifelong learning. Twelve lifelong learners from a wide range of backgrounds, ages, and experience were serially selected using maximum variation sampling. Most qualitative research uses a priori questions aimed at a specific topic, limiting participants' discussion. In this study, however, grand tour questions prompted each participant to offer information about lifelong learning experiences. In-depth interviews revealed 16 thought categories including integration of life and learning, learning process, role, influences, major life changes, benefits, favorite topics, issues, view of self, and motivation to learn.

This constructivist research allowed each participant freedom to explore topics during several interviews which were documented by audio recordings and handwritten notes. Member checks during interviews assured the written description matched each participant's perspective. A grand member check brought participants together to suggest edits and finalize approval of their perspectives, as written in the study.

Three outcomes resulted. First, the study compiled 12 learners' unique and verified perspectives through participant profiles and a case study narrative. Second, despite sharing common traits with other learners, each learner integrated lifelong learning in a unique way. Organic descriptors, such as seeker, academic entrepreneur, new individualist, pragmatist, holistic thinker, creative compromiser, nonconforming introvert, restless idealist, and community leader, labeled participants and illustrated their self-integration. Third, a theory grounded in the lifelong learners' common and uncommon traits was developed. The Inside-Outside Theory of Lifelong Learning Integration posits that, while there are similarities in learning processes and preferences among the study's learners (i.e., inside traits), there are also differences distinguishing learning processes and preferences for each learner (i.e., outside traits). This study-specific theory helps facilitate recognizing inside and outside traits among any and all of the learners.

DISSERTATION TITLE

A Construction of Twelve Lifelong Learners' Perspectives:

An In-Depth, Naturalistic Study of Self-Integration of Lifelong Learning

BY

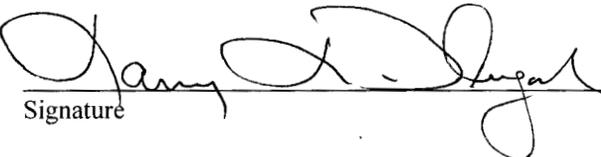
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Chapter 1—Nature and Significance of Problem

Introduction

In the late 1970s, an elderly Clarence “Pappy” Galbraith slowly walked into the music store where I worked, his old cardboard guitar case in hand. I wondered if he was seeking a repair or perhaps attempting to sell his inexpensive instrument. I envisioned him finding the guitar while clearing off the back porch after “cleaning house.” He ambled up to the counter and asked if I knew anyone who gave guitar lessons. I explained that I taught guitar. “Who wants lessons?” I asked.

“I do,” he replied. His answer surprised me. The elderly man who must have been about 80 years old did not begin to fit the profile of my other 20 students. A long-retired, gray-haired pharmacist stood in stark contrast to my teenage “wanna be” rock stars. We became friends as week after week he tried to learn the secrets of strumming simple chords to campfire songs such as *Red River Valley*, *Home on the Range*, and a few others from his era. Though his progress was limited, he persisted. After many weeks, however, he quit coming to lessons. I later learned he had died of old age.

His death must have occurred in the mid-1980s. In the final years of his long life, Pappy’s quest for lifelong learning stirred vigorously in his heart. Meanwhile, the concept of lifelong learning in our society lay dormant like a sleeping giant. Perhaps that giant was beginning to exit its slumber. The period of the 1950s through roughly 1985 has been called “The Awakening,” referring to the increased activity related to lifelong learning in America (Manheimer, 2005). Undoubtedly that giant has now awakened, as evidenced by the hundreds of lifelong learning institutes in America today.

Perhaps Pappy served a critical role of predecessor to this new age of learning across the lifespan. He and others like him refused to equate old age with an inactive mind. And because of that, he formally sought learning experiences beyond such typical activities as reading the newspaper or watching television. Though he learned slowly, he persevered. Though he was frustrated at times, he enjoyed the journey.

Little did I realize while providing guitar instruction to Pappy that I would someday want to know much more about people like him who share a similar zest for learning. The desire to gain a deep understanding of a specific group of lifelong learners has inspired this research.

Brief History of Lifelong Learning

The story of a retired elderly person with a burning desire to learn how to play a musical instrument may be more common now than in any other time in history. This could be due partly to the fact that there are simply more people who are aging. In the United States, the population of people over 65 years numbered 35.9 million in 2003, an increase of 3.1 million or 9.15% since 1993 (Administration on Aging, 2004). With more people in higher age brackets, more potential exists for lifelong learning that includes people in the 50+ age group. Along with a significant increase in older people, the concept of lifelong learning also began shifting as the 20th century came to an end. Although the aim of this discussion is not to provide a detailed history of lifelong learning, key concepts and historical stages of adult learning will help provide context for this research.

The following discussion of stages in the development of educational models in the past 50 years reflects major areas of change noted in the adult education literature.

However, “models that involve the passing through of certain defined stages are problematic” (Smith, 1999, ¶ 20). Not all authors agree such stages are easily defined or even exist. A clearer picture of reality might be that we cannot even distinguish between child and adult learning. Kidd (1978) believed “what we describe as adult learning is not a different kind or order from child learning” (p. 17).

Others may judge whether or not the past 50 years of academic discussion have proven fruitful in terms of a meaningful description of learning paradigms, learning mechanisms within adults, and distinguishable eras in the history of lifelong learning. The authors discussed below have attempted to clarify how things “really work” in educational systems and within the minds of adult learners. Rather than a complete literature review, the following discussion explores key learning environment concepts identified by leading theorists. These concepts are critical to understanding the adult learners who are the focus of this study.

Traditional Models of Pedagogy

Learning appears to take place from the time of birth until the time of death. The term “cradle to grave” learning has become more of a reality during the last half of the 20th century. In the first half of the century, educators focused on the child and young adult. Levinson (as cited in Tennant & Pogson, 1995) labeled the first of four periods of human development as childhood to adolescence. This period ranges from roughly birth to 20 years of age and is the first of four eras in the lifespan. He referred to the other developmental periods as early adulthood, middle adulthood, and late adulthood. During the second half of the century, Levinson and others have emphasized the last three of these eras.

Pedagogy in its earliest form focused on teaching methodology correlating with physical maturation through adolescence. The educational focus on youth stems from European monastic schools during the Middle Ages, when monks taught young boys in the church. The term pedagogy derives from the Greek word “paid,” meaning child, and “agogos,” meaning leading. Pedagogy has been defined more in recent decades as the art and science of teaching children (Hiemstra & Sisco, 1990).

Despite the early educational focus on youth, the pedagogical model has historically been used across educational levels and ages in the United States and throughout the world. The distinct relationship between teacher and learner has dominated the typical approach to education for the past several hundred years. Within the model, the teacher teaches and the learner learns. Learners rely on teachers to impart wisdom through instruction. Learning takes place from the outside in. How learners apply learning to their lives depends on how much they take from the teacher-learner interface. This depends on the quality and abilities of the teacher and the discipline brought to the instructional experience. This approach has met broad challenges in recent decades, especially regarding the education of youth.

Common vernacular for describing this instructional style includes phrases such as *sage on the stage* or *the hypodermic model*. The sage on the stage indicates the wise teacher in front of and at an elevated height from students. The teacher imparts wisdom that students need to learn. The hypodermic model metaphor refers to “injecting” information into a student. It conjures up images of the doctor/patient relationship. The doctor/teacher knows what is best for the patient/student and through painful injection of medicine/instruction provides the cure or wisdom.

These concepts and methods were tolerated by children and their parents prior to the introduction of more interactive models. As adults became increasingly interested in education throughout their lives, especially after World War II, the traditional models became less attractive and a new paradigm for adult learning emerged.

Perhaps Rogers' suggestion in 1951, that learning represents a natural process organic to an individual, ushered in a new age of adult learning. Rogers (1951) believed the learner controls the internal process of learning (pp. 284-428). This concept stood in contrast to Locke's (1737) idea that the human mind is a blank slate at birth and that nurturing the mind continuously shapes it from the outside in. The term andragogy, with roots in the Greek word "andr" or "andro," meaning "akin to man," or "man," (Webster's, 2003) had been used at least as early as the 1830s. The term was endowed with new life by Malcolm Knowles in a variety of writings from the 1950s to the 1980s. These writings ushered in a new academic era of adult learning and are discussed in greater detail in the next section.

Shifting to Adult Learning and Andragogy

Some of the earliest 20th century writings on adult learning included those by Eduard Lindeman, who wrote *The Meaning of Adult Education* in 1926. Lindeman experienced an eclectic career writing about social work, community building, and other areas of interest. His book emphasized that education can be integrated into and enjoyed throughout life rather than just helping the young mind preparing for a career.

Malcolm Knowles' well-known work in adult learning stemmed from Lindeman's earlier concepts. In the 1970s, Knowles (1970, 1973) wrote extensively about the concepts of andragogy and the andragogical model. Through those writings, Knowles

identified four assumptions central to andragogy. By 1984, Knowles' concepts had matured, and he had added a fifth assumption to complete the set of premises below:

1. Self-concept: As a person matures his self-concept moves from one of being a dependent personality toward one of being a self-directed human being.
2. Experience: As a person matures he accumulates a growing reservoir of experience that becomes an increasing resource for learning.
3. Readiness to learn. As a person matures his readiness to learn becomes oriented increasingly to the developmental tasks of his social roles.
4. Orientation to learning. As a person matures his time perspective changes from one of postponed application of knowledge to immediacy of application, and accordingly his orientation toward learning shifts from one of subject-centeredness to one of problem centeredness.
5. Motivation to learn. As a person matures the motivation to learn is internal.

(p. 12)

Perhaps Knowles' (1970, 1973, 1984) greatest contribution to adult learning was his recognition that most educational programming in the United States, even when attended by adults, was still geared towards younger learners in credit-type settings and often career-oriented. Knowles emphasized the concept of informal education as a way to distinguish between more formal career training and the type of education adults often pursued. Adult education for mature individuals often led to club or association activities. These local organizations offered a style of learning that was more flexible in structure than typical career training programs.

By the end of his career in the 1990s, Knowles realized that emphasizing informality might not have been the best way to characterize adult learning. Yet, the informal or flexible nature of community-, association-, or club-based programs exemplified the way society supported adult learning in the 1950s through the 1980s. By the 1990s, the concepts of informal adult education began to include terms such as *learning in retirement* and *lifelong learning*. People seeking education through learning in retirement or lifelong learning institutes found an increasing number of formal, short-course programs that appealed to a wide variety of interests.

Progression to Lifelong Learning

In the broadest sense, lifelong learning can be defined as any type of learning at any phase of life. Certainly, more people currently engage in learning throughout life than at any previous time in history. This includes learning in primary and secondary schools, higher education or technical schools, a range of professional education for extending credentials and career-based knowledge, and education for no other reason than to enjoy the learning process. The term “lifelong learner” commonly refers to a mature adult, beyond the age of the traditional student, who chooses freely to pursue education for self-enrichment. This study’s focus on the older, mature adult accepts common uses of the terms lifelong learner and lifelong learning.

The current adult learning climate accommodates the older learner’s needs to be productive and active. The lifelong learner today expects more intellectual engagement, social relationships, community involvement, and intergenerational learning than perhaps at any other time in history. Evidence of this can be found by observing the curriculum of over 400 U.S. lifelong learning institutes, the opportunities for educational travel, and the

wide variety of educational movements including elder hostels, learning in retirement institutes, third-age institutes, and lifelong learning institutes. Most or all of these provide opportunities for self-actualization of the mature adult through intellectual engagement with peers in a social yet academic setting.

Many factors have compelled change in the concepts, methods, and theories relating to the current practice of lifelong learning. Five prominent areas have made a significant difference in driving this change—educational theory, public and private policy development, changing demographics, institutional development and change, and needs of adult learners. These areas interacted in the marketplace of ideas and national economy to generate a lifelong learning environment distinct from the adult learning environment of mid-century and before.

Educational theory. Educational theory connects to both early philosophical roots and current research. Dewey (1916), the grandfather of progressivism and the founder of the philosophy of pragmatism, proposed that learning simply reconstructs experiences. Dewey believed that if a student did not enjoy a particular topic, such as history, he/she simply had not yet personally experienced enough life to apply his/her thinking to historical studies. Kant's (1770) subjectivism, Hegel's (1804) humanistic views, Freud's (1900) psychoanalytical approach, Gramsci's (1921) intellectual informalism, Skinner's (1954) behavioralism, and Gardner's (1983) multiple intelligences are great works in psychology, philosophy, and education that have contributed to the broad spectrum of thinking about human thought, potential, and learning. These highly recognizable contributions serve as a base and a point of departure for many new ideas about how lifelong learning occurs and how it should be addressed.

Beyond Lindeman (1926) and Knowles (1970), more recent scholarship focuses on adult learners who have chosen to seek education simply for the love of learning. Elias and Merriam (1980) attempted to sort through adult learning publications by offering six thought systems in which adult education philosophies could be categorized. Those systems include liberal, progressive, behaviorist, humanistic, radical, and analytic viewpoints.

The liberal philosophy became dominant in the Western world and emphasizes rational and intellectual abilities through disciplined study (Price, 2000). The progressive philosophy includes a holistic view of education as lifelong and encompassing all aspects of life and learning. The progressive viewpoint focuses on the individual learner's experience and a pragmatic approach to problem solving. The behaviorist theory includes assumptions related to philosophical issues and the correlated issues, questions, and answers may be considered part of a behaviorist philosophy. These assumptions include the survival of individuals and society as a key purpose of education. Educational behaviorism focuses on observable, measurable behavior and the manipulation of variables in the environment to elicit change.

Humanistic philosophy aims to develop the whole person to her/his fullest potential including the emotional and intellectual realms of experience (Price, 2000). With humanism, the self-actualizing individual seeks facilitation of his/her learning needs through an educational setting or instructor. Individuals with radical humanistic perspectives seek fundamental social change in economic, social, and political systems, which, according to the perspective, have become corrupt through institutionalization.

With radicalism, educational systems are naturally corrupt and may only be changed through new and radical ideas that undermine all established systems.

The analytic tradition “constitutes a process of clarifying and justifying language and concepts used in the discipline, rather than being a distinct system of educational values, beliefs and practices” (Price, 2000, p. 4). By extending the analytic tradition more broadly into the arena of values and beliefs, a philosophical orientation of neo-rationalism could emerge. This emergence of new emphasis on analytical abilities and thought correlates with developments in educational, psychological, and biological analysis through computational statistics, bioinformatics, and other informational technologies that are changing the way educators and learners think.

Day and Amstutz (2003) attempted to provide an overview of commonalities in educational theory by identifying seven core values across a range of recent scholarship. Citing the works of Elias and Merriam (1980, 1994), Merriam (1977), and Zinn (1999), Day and Amstutz noted some authors believe one point of view, such as perennialism (i.e., teaching reasoning and principles instead of facts; personal development instead of skills). This eliminates the possibility of holding another viewpoint, such as reconstructionism (teaching and learning to change the social order through mutual needs). They also “suggest that holding one set of beliefs does not eliminate the possibility of holding additional belief-sets” (p. 3). In order to reconcile how one might value reconstructionism while simultaneously applying the values of perennialism, Day and Amstutz identified cultural custodianship, useful knowledge, spiritual connectedness, personal existence, individual/group growth, social reconstruction, and scientific scholarship, as seven values that “seem apparent in adult education practice” (p. 4).

Brady's (2003) pragmatic research approach focused on peer instruction in lifelong learning institutes. He recognized that peer teachers encounter several special challenges including a wide range of educational backgrounds, subject-matter expertise among selected students, limitations in program structure, physical changes that accompany aging, and ambivalence about lifelong learning institutes' mission. Lamb and Brady (2005) continued a discussion of pragmatics by noting that lifelong learners reported how learning was enhanced through intellectual stimulation, a nurturing and supportive community, self-esteem building, and opportunities for spiritual renewal.

Although the works of Brady (2003), Lamb and Brady (2005), and Day and Amstutz (2003) address lifelong learners, others delve into learning as it specifically relates to the advanced older learner. This distinction between adults and advanced older learners has become more widespread due to an increase in educational gerontology articles. While the term "senior citizen" often indicates a person 65 years of age or older, an advanced older learner is typically 75 to 80 years of age and beyond.

Ardelt (2000) argued that "wisdom rather than intellectual knowledge is crucial for aging well" (p. 771). He believed intellectual wisdom related to knowledge in areas of goals, approach, range, and acquisition of effects on older learners. The depth and range of scholarship relating to adult learning, lifelong learning, learning in retirement, third-age studies, and gerontological education have created awareness about the possibilities for teaching adults and about the unique characteristics of the adult learner.

Educational theory of adult learning reflects the historical development of educational systems and actively encourages ventures into new educational systems. For example, Finger and Asún (2001) believed that *éducation permanente*, a UNESCO-

originated concept that would create a society where everybody is learning all the time, “is a badly needed social movement as opposed to traditional education, which is said to perpetuate the status quo” (p. 25). The range of literature relating to adult learning has provided increased awareness, scholarly activity, and innovative curricular design.

Whereas the theoretical and pragmatic ideas above provide a sample of adult learning theories in the educational literature, chapter 2 provides a more complete overview of adult learning literature.

Public and private policy development. Individuals, institutions and policy-making bodies have responded to an increasingly large demographic of adult learners who vocalize interest in non-career-related learning activities. Policy can be located in, or generated from, a wide range of organizations including smaller retirement communities, larger non-profits such as AARP, or state or federal governments. Because of the range of institutions and the variety of interests held by stakeholders in those institutions, lifelong learning policy is neither unified nor monolithic.

Manheimer, Snodgrass, and Moskow-McKenzie (1995) discussed nineteenth century to current policy developments influencing adult learning in America. Key 20th century developments include the federal government’s National Conference on Aging in 1951 and the Federal Council on Aging in 1956. These preceded the Higher Education Act and the Older Americans Act, both in 1965. Prior to the mid 1960s, older Americans were often seen as frail, uninvolved, retired, and disinterested in self-actualization or education. The Older Americans Act assisted older adults in “gaining equal opportunities with other age groups for such rights as adequate income, suitable housing, services, physical and mental health, freedom, and dignity” (p. 134).

The Older Americans Act functioned at a policy level while, concurrently, President Johnson's "Great Society" attempted to function at a conceptual level by indicating the desire for a more idealistic society that accepted all people. Policy development at the governmental level and general societal change led to support for more older adult programs. The Adult Education Act (AEA) of 1966 indicated the government's willingness to focus on aging adults' needs relative to poverty and adult literacy. While the AEA increased awareness of the needs of adults and basic education for all people, it did little to promote the cause of true lifelong learning.

In 1971, the White House Conference on Aging helped to establish public policy supporting the education of older adults. By 1976, the Lifelong Learning Act was established and included a list of 20 areas ranging from adult basic education to education for older and retired persons. Because of the diffuse range of areas, this legislation was difficult to enact through public policy. With the passage of the Workforce Investment Act (WIA) of 1998, the Adult Education Act passed into posterity. The WIA focused in localizing training and employment programs, adult literacy, and placing the locus of power within the individual to select appropriate career training opportunities. Lifelong learning, as practiced today, was not integrated into the WIA by the federal government.

The problem of inadequate federal funding has been countered by private-sector investment in lifelong learning. Investment by the Bernard Osher Foundation exemplifies the considerable effort a private foundation can make to further lifelong learning. Since 1999, the Osher Foundation has supported the creation of over 93 lifelong learning institutes in the United States. Bernard Osher created the foundation to support educational, cultural, arts, and alternative (or integrative) medical-related activities. His

vision includes establishing a lifelong learning institute in every state. These institutes focus on learners over 50 years of age and cater almost exclusively to the learning needs of individuals seeking education for personal enrichment, not career development.

Aside from federal government policies, state and local initiatives have provided many adult learning opportunities. Tuition waiver programs are currently in place at many major universities for people nearing or at retirement age. City libraries provide educational opportunities for adult citizens across a broad spectrum of disciplines, and hospitals provide education relating to health and safety. The policies of federal, state, and other governmental organizations, along with support from private sources, have led to an increasing number of learning opportunities for Americans of all ages.

Despite government and private support for lifelong learning, Peterson and Masunaga (1998) insist that new policies are sorely needed. They cite seven areas for potential policy development. These areas include: encouraging participation in educational programs by older people; broadening participant diversity; encouraging development of organizations specializing in education of older people; guiding evaluation of educational programs; dealing with the preparation and expertise of older adult instructors; clarifying through state and federal policies who should pay for adult education and committing those levels of government to that support; and creating durable and sustainable programming through long-term commitment. As more people age and seek lifelong learning it will be interesting to see whether or not a broader spectrum of policies supporting adult lifelong learning will be implemented.

Changing demographics. People of all ages embrace learning through primary or secondary school activities, martial arts training, religious study, higher education

programs, professional training, individual study such as music lessons or creating specialized collections, or increasingly “typical” lifelong learning through formalized noncredit short courses from universities. These examples may be better understood by considering the demographics of aging in America. The following discussion will be limited to demographics relating to Americans in the baby boom generation and older.

The term “baby boomers” indicates people born between 1946 and 1964.

Although the population of newborns “boomed” after World War II, by 1957 the birthrate in the United States began to decline (Post World War II Baby Boom, 2005). This range of years (1946-1964) indicates the youngest baby boomers have attained the age of 42 at the time of this study, and the oldest boomers are now 60 and nearing retirement.

Several statistics will help portray the aging of America and the dramatic change this will create in the next several decades. According to the Administration on Aging (2004), the number of Americans aged 47 to 66 who will reach 65 in the next 18 years increased by 39% this decade. The median age of the American population from 1950 to 2005 has changed from 28 to 33. The U.S. Bureau of the Census (1985) predicted that the median age by 2020 will be 40. By the year 2030 the older population (people over 65) will more than double the 2004 level and is predicted to be 71.5 million. Dychtwald (1989) called this aging phenomenon *the senior boom* and noted that “there have been baby booms before, but there has never been a senior boom” (p. 10).

The impressive increase in older Americans combined with changes in life expectancy and demographics of educational attainment help complete a broader picture relating to lifelong learning. The life expectancy at birth in the year 1950 for both sexes was approximately 68.2 and by 1987 that figure increased to 75. (Administration on

Aging, 2004). Life expectancy at birth for all people in the United States in 2003 was 77.5 (National Center for Health Statistics, 2006). Those who lived to age 65 in 2004 will have an average of 18.2 years left to live, making their life expectancy 83.2 years (National Center for Health Statistics).

Great increases in the educational level of people over 65 have occurred during the past few decades. The Administration on Aging (2004) noted between 1970 and 2003, the percentage of people over 65 completing high school rose from 28% to 71%. However, the percentage completing high school varied considerably by race and ethnic origin. In 2003, 76% of whites, 70% of Asians and Pacific Islanders, 52% of African-Americans, and 36% of Hispanics completed high school. The increase in educational levels over time is also evident for Americans age 65 and older. In 1970, only 30% of whites and 9% of African-Americans in the over-65 age group were high school graduates. Because of increased life expectancy, greater numbers of older people, and higher levels of educational attainment, the need exists for increased lifelong learning opportunities.

Institutional development and change. Early American efforts to promote community wide and adult education included the lyceum and Chautauqua movements and social clubs during the 19th and early 20th centuries. Educational programming for adults during the last half of the 20th century included growth in senior center activities, parks and recreation groups, elder hostels, learning in retirement institutes, and most recently, lifelong learning institutes. During the past several decades, institutions of higher education have played an increasingly important role through four primary functions: creating tuition relief funds for older people in credit-based courses, housing

lifelong learning institutes, offering academic programs in the arts and humanities including lecture series and community exploration tours, and establishing alumni-based activities. These recent developments in higher education stemmed from a multidisciplinary approach in early American schooling systems.

Aristotle's school in ancient Athens, the lyceum, inspired Josiah Holbrook in 1826 to create a program of adult education courses in Millbury, Massachusetts (Readers' Companion to American History, Lyceum, 2005). This school led to the National American Lyceum in New York City. By the mid 1830s, thousands of lyceum organizations cropped up across America. Truly a liberal arts style of education, lyceums provided audiences lectures, concerts, scientific demonstrations, dramatic performances, debates, and discussion groups. The early lyceum format yielded a far-reaching influence on other organizations:

Institutions such as the Lowell Institute in Boston and Cooper Union in New York City were initially established as lyceums. Many of the best-known artists, writers, politicians, and journalists of the day appeared on the lyceum circuit, often scheduled through central booking offices like the Boston Lyceum Bureau, organized by James Redpath, a leader in the movement. During its most active years—the 1830s to 1860s—the lyceum movement played an important role in American public education and social reform. Its influence began to wane after the Civil War, but its activities were carried on later by the Chautauqua movement. (Readers' Companion to American History, 2005)

During the 20th century, public and private schools in America continued the concept of the lyceum by sponsoring demonstrations, lectures, and entertainment. These

programs, referred to as lyceums, were typically provided by specialized vendors who sold their educational services to schools.

The Chautauqua movement also left its educational mark on American society. Originally started after the Civil War for Bible study and recreation, the first meeting took place during the summer of 1874 at Lake Chautauqua, New York. By the late 1800s, educational programming had spread throughout the United States and included farm studies, weekly lectures, and concerts (Reader's Companion to American History, 2005).

These institutionalized efforts to provide broad educational programs to adults were replaced, in part, by The Elderhostel Institute Network. It was created in 1962 in New York City under the sponsorship of the New School for Social Research (Nordstrom, 2005). This inception date conflicts with Manheimer et al.(1995), who dated their beginning in 1975 at the Center for Continuing Education at the University of New Hampshire in Durham. Originally associated with higher education, the Elderhostel Institute Network grew beyond its association with colleges and universities and established a self-sustaining network that remains today.

The Elderhostel Institute Network's original intent was to develop a more inclusive network of institutes for learning in retirement. Nancy Nordstrom (2005), a program manager of the Elderhostel Institute Network in 2004, estimated there are now "just over 300" institutes for learning in retirement belonging to the Elderhostel Institute Network. In 2005, Nordstrom estimated 500 institutes for learning in retirement existed (some institutes for learning in retirement are not associated with the Elderhostel Institute Networks). Now, most institutes for learning in retirement have changed their names and have become lifelong learning institutes.

The numbers of people involved and the number of Elderhostel Institute Network locations continue to be impressive. With 1,800 sites in the United States, Canada, and 45 countries worldwide, the Elderhostel Institute Network enrollment annually averages more than 300,000 (Manheimer, 2005, p. 45). Elderhostel Institute Network also provides a considerable amount of international travel and study abroad activity.

The creation of lifelong learning institutes (LLI) marks the most current institutional development in the United States. Lifelong learning institutes distinguished themselves from learning in retirement institutes by dropping the term “retirement,”—avoiding its recent negative connotation as a period of inactivity and withdrawal from society and focusing instead on education of people 50 or 55 and older. Most lifelong learning institutes are associated with institutions of higher education and offer inexpensive noncredit short courses. A wide variety of course formats and membership fees exist within lifelong learning institutes due to the discretion of local management and availability of local resources.

Two general models of lifelong learning institutes include programming that originates from the membership on a volunteer basis or programming that originates through those administering the institute. In the model using volunteers, members decide on curriculum, often through committee activity, and locate individuals in the community to teach the courses, whether those individuals are university faculty or local. In the model in which administrators determine curriculum, the institute director and staff often seek opinions and ideas from institute members to create classes that will be engaging to members.

By not using the term “retirement,” lifelong learning institutes have helped to redefine the concept of aging and education for Americans. Other manifestations of the same concept can be found. Another example includes AARP, which no longer represents an acronym, but instead is the formal name of the organization. AARP offers the following explanation:

Membership in AARP is open to any person age 50 or above. With 25 percent of the U.S. population in the 50+ category, nearly half of all people in this age bracket are AARP members. However, U.S. citizenship is not a requirement for membership; over 40,000 members live outside the United States. People also do not have to be retired to join. In fact, 44 percent of AARP members work part time or full time. For these reasons, AARP shortened its name in 1999 from the American Association of Retired Persons to just four letters: AARP. The median age of AARP members is 65, and slightly more than half of them are women. (AARP, 2005)

The path of institutional growth for lifelong learning in America has expanded through a variety of organizations. These include the Shepherd’s Centers, a community nonprofit sponsored by a coalition of religious groups committed to delivering services and programs to older adults; public libraries; hospitals; parks and recreation centers; community colleges; and colleges and universities among others. These opportunities, though widespread, often operate on the fringe of budgetary support through governmental and private financial backing. Their sustainability will depend on whether the increasing numbers of baby boomers use these resources.

The viability of nonprofits also depends on individual financial contributions in conjunction with other support mechanisms such as contributed services. Contributed services include volunteering to help administer programs, helping at the front desk or other clerical support, hosting events, supporting marketing, and other activities.

Lifelong learners' needs. Undoubtedly, older adults need, want, and pursue continuing education. Adult participation rates in formal lifelong learning activities suggest the general population has embraced lifelong learning in the past decade and that “the learning society” may have arrived. U.S. data for 1998–1999 show an estimated 90 million persons, 46 percent of adults, enrolled in a course during the preceding 12 months—an increase from 32 percent in 1991 (Families.com, 2005).

More studies in lifelong learning will explain why large groups of older people are pursuing lifelong learning, since little is known about specific needs that lead to participation in education. The literature has not assessed the complete educational needs of lifelong learners. However, needs in a variety of areas, including technology (Chaffin & Harlow, 2005) and instructional needs (Jones & Bayen, 1998; Morris & Ballard, 2003), have been addressed. These studies help us understand older learners' use of e-mail and other media, but they do little to help us peer into learners' minds to better understand what core human values and needs are met through the learning process.

Closely related to research on older adult needs is the study of motivation for pursuing lifelong learning. Kim and Merriam (2004) discussed learning motivations in older adults and included their cognitive interests and social contacts. The next chapter contains a detailed discussion regarding motivations for learning in older adults.

Although older adult learners' expressions of educational needs are being heard and responded to through lifelong learning institutes and other American organizations—at least to some extent—there is little in-depth research about the complex inner thoughts of adult learners. This research attempts to gain a deeper understanding of individuals participating in the lifelong learning process through sustained interaction with them. The following section describes the specific scope and intent of this project.

Statement and Scope of Problem

Missing in the lifelong learning research field is an in-depth analysis of lifelong learning from the perspective of the learners themselves. This study approaches the problem of a lack of such in-depth study by attempting to discover the purposes and roles lifelong learning plays for a diverse group of 12 individuals participating in the study. Specifically, this inquiry seeks answers from each of the 12 participants to the following question and then compiles their responses into a case study:

What is the rich, lived, lifelong learning experience from the individual's perspective?

To answer this question, other grand tour questions were created and then asked to research participants. The grand tour questions are discussed in more detail in chapter 3.

Rationale for Study

It is critical to understand the process of lifelong learning from the perspectives of the participants. As baby boomers retire and large numbers of people leave their work lives to pursue a variety of educational interests, lifelong learning will play an increasingly important role as a choice for both free time and discretionary spending. The

current literature, based primarily in educational theory, presents ideas about how lifelong learning works and what motivates lifelong learners to participate in the learning process. Though the literature explores the activities of lifelong learners, little research offers an in-depth case study into lifelong learning from the learner's perspective. This research offers an inductive process grounded in specifics of individuals' stories and perspectives. This research also offers a case study and a study-specific theory about how individuals integrate lifelong learning in their lives.

This interactive and subjective process yields an in-depth case study that can be compared to other studies or situations. It reveals the complex context and meaning for lifelong learning in a diverse group of individuals. The context and the outcomes of the study may be judged by the reader for transferability and application to any other situation.

Purpose of Study

The primary purpose of this study is to describe and explain the in-depth process of lifelong learning from the perspectives of 12 diverse adult lifelong learners over 50 years of age. These learners have been actively engaged in learning through formal activities such as noncredit short courses in a university setting. However, their learning goals are not dominated by degree or nondegree programs that will advance a career, increase income, or create advantage relative to a profession. Instead, the learners in this study chose to engage in the learning process for the pure benefit of learning.

Context and Scope of Research

The context for this research includes a need to explore the minds of people who have a proven interest in lifelong learning. An obvious question would be how to

determine a proven interest. A second question relates to appropriate age category for participants. Those questions are addressed below.

Proven Interest in Lifelong Learning

This study's participants, with sustained interest and experience in an organized style of learning, have proven they value learning for the sake of learning. The lifelong learning the 12 participants experience often includes formalized noncredit short courses for more than one semester. Typically, something other than career advancement motivates the participants to enroll in these short courses or other formalized educational offerings.

Some participants do not distinguish between formalized lifelong learning courses and other enriching experiences such as serving on advisory boards in their communities or working part-time for a social services agency. Thus, a blurred definition exists regarding exactly what constitutes learning for the sake of enrichment. This study examines the issue of definition of lifelong learning in the last three chapters.

Appropriate Age Category

Age category is satisfied by participants who are clearly beyond the age of the traditional 5 to 25-year-old student and, more specifically, targets people 50 and over. It might be difficult to determine that a traditional student, in fact, values lifelong learning. As a learner exits the traditional age bracket, the answer to the question—Will the student continue as a lifelong learner?—can only be answered by the learner's future engagement in lifelong learning activities. Students in P-12 education, for example, meet basic legal and societal expectations by attending school. Students participating in levels 13 through undergraduate or graduate studies typically seek degrees that will facilitate career growth.

By limiting the study to people age 50 and over who do not focus on career-enhancing credentials through their lifelong learning experiences, this research assures that participants pursued learning for learning's sake rather than an external or artificially imposed motivator.

Closely Related Research

Additional research also helps to contextualize this study and its scope. Although many published articles discuss lifelong learning, most articles vary considerably from the purpose and methodology employed by this research. Two studies, however, provide appropriate context because they are similar in interest and use similar qualitative methodology.

The two doctoral research studies in lifelong learning use, to some extent, grounded theory to investigate their topics. Martin (1995) explored the loyalty of older adults to the institution of higher education they attended as learning in retirement institute members. She employed both qualitative and quantitative methodologies and found that older adults in learning in retirement institutes tended to “hold feelings of loyalty for the higher education institutions sponsoring the institute” (p. v).

Martin (1995) designed the study to investigate loyalty and used a method of naturalistic inquiry (Lincoln & Guba, 1985) to obtain in-depth information. She found, not surprisingly, that such loyalty can be cultivated by consciously building relationships between the institution and the older adults. This requires a commitment on behalf of the institution to understand the learners' educational needs and to assist them with their continuing interest in learning. Relationship enhancement increased when the institution provided opportunities for older adults to take an active role in other areas of campus life.

Communication played a central role to all processes between the college or university and the learning in retirement institutes.

This study departs from Martin's (1995) research, however, because her a priori approach focused on the topic "loyalty to higher education institutions." Martin created research, knowing that she wanted to learn if and how older learners pledged loyalty to an educational institution. This research purposely does not predetermine a narrowly defined topic, such as loyalty to an institution. Instead it simply seeks to understand the participants' perspectives regarding lifelong learning. Chapter 3 provides greater detail about the methodology supporting this research and distinguishes it from an a priori approach.

Scott (2002) completed a dissertation on the self-efficacy and perseverance in adults over 50 pursuing lifelong learning. Her constructivist grounded theory emphasized the role of ecology in analysis and interpretation. She found that "self-efficacy is a strong contributor to commitment to extraordinary involvement" (p. iii). She also recognized the "push" of perseverance as unnecessary in the presence of a compelling "pull" of commitment in individuals committed to lifelong learning.

The individuals Scott (2002) studied made an inspired commitment to extraordinary involvement in a pursuit of learning despite the sacrifice required to develop their highest potential. For example, a man named Floyd left his full-time position at 56 years of age and dedicated over "80 hours a week to music, principally piano instruction, performance, recording, and composition" (p. 3). The example of Floyd's interest in music and his pursuit of learning music illustrated high self-efficacy and the pull of music in his life.

Like Martin (1995), Scott's (2002) a priori premise included the selection of self-efficacy and perseverance in older adults as starting points for her research rather than a more open inquiry as used by this study. Even though this study utilized a purer naturalistic inquiry approach, as defined by Lincoln and Guba (1985), than Martin's and Scott's studies, they remain closely related for two reasons: They include an assumption that lifelong learning is an individualistic choice in people over 50 and the methods used by those studies included a grounded component in which results grew inductively from information provided by participants, as do results in this study.

Chapter 2—Related Literature

This chapter has four sections, each providing a key context for lifelong learning in the 21st century. The first section discusses the sociological and educational literature addressing growth of lifelong learning in America since World War II. The second examines motivational theory in adult learning. The third discusses recent technological developments that may affect lifelong learning opportunities. The final section examines the literature relative to naturalistic inquiry—the in-depth investigation and analysis process recommended by Lincoln and Gube (1985) that was used in this research.

Sociological and Educational Change Fueling Lifelong Learning

Chapter 1 discussed the demographics of the “senior boom” (Dychtwald, 1989) and the rapidly changing environment where more Americans are reaching old age than ever before. Chapter 1 also noted how the following five factors, and possibly others, have worked synchronously to create the current lifelong learning environment: Educational theory, public and private policy development, changing demographics, institutional development and change, and lifelong learners’ needs. These social and educational phenomena have helped create changes in both institutions and within individuals involved in lifelong learning. The following discussion further explores the literature on lifelong learning in America.

From Traditional Concepts in Lifelong Learning to Current Meaning

Understanding the various meanings of “lifelong learning” requires investigating the setting—in this case America—and an era—from approximately 1950 to the present. Admittedly, the following discussion provides an Americentric explanation of the term’s shifting meanings.

“Lifelong learning,” as currently understood, started developing in the last half of the 20th century, after 5 decades of traditional education. Within the traditional model, a learner was identified as a student during the “student years” or approximately 5 years of age through the mid-20s. Prior to the last 50 years, lifelong learners were typically in their mid-to-late 20s. Lifelong learning generally referred to activities embraced by traditional students such as seeking a degree or developing a trade after a military career.

A second traditional meaning for “lifelong learning” during the same period referred to professional credentialing. Then, as now, professionals sought education throughout their career to meet educational requirements imposed by their professional affiliated association. This concept of learning while employed to fulfill a professional or employment credential ties learning to a relatively short- or medium-term goal—furthering a career.

Currently we conceptualize lifelong learning as liberal learning throughout the lifespan irrespective of degrees or professional requirements. This concept ties learning to a long-term goal—learning throughout the rest of one’s life. These two concepts are identified with instrumental learning (i.e., strategic study for career or vocational advancement) and enrichment learning (i.e., enhancing one’s knowledge and wisdom throughout life). In 1951, Parsons introduced similar concepts of instrumental and expressive learning goals, and subsequent research has adopted this distinction (Havighurst, 1976; Londoner, 1971, 1978).

The goal of having a successful career often supercedes the goal based on pure enrichment learning. Once a career terminates, however, the need for professional continuing education diminishes. At that point, those in middle or late career or those

who have retired from a career often seek lifelong learning as a long-term goal. The example of “Pappy” Galbraith in the opening paragraphs exemplifies such long-term thinking.

One might ask why a younger person often identifies learning as a short-term goal, while older people often tie learning to long-term goals. This seems ironic since less life typically remains for older people. It could be argued that this occurs because wisdom increases with age (Ardelt, 2000). Pragmatic considerations surely come into play as well. Early careers often require instrumental education to help legitimize or establish a person at a particular development stage or pay scale.

Further, the choice and ability to learn do not always correlate with age-specific variables. The amount of education one pursues throughout life depends on other factors including income and educational background. Those with higher incomes and higher levels of education are more likely to participate in work-related and personal interest courses (Kim, Hagendorn, Williamson & Chapman, 2004, pp. xii-9).

Complications also arise when examining terms related to “lifelong learning,” such as formal, informal, work-related, college-based, and self-interest classes. Knowles’ (1970) highly influential concepts of informal adult education do not match a National Center for Educational Statistics (NCES) study’s definitions (Kim, Hagendorn, Williamson, & Chapman, 2004, p. 2). The NCES study stated that “informal educational activities are those that do not involve an instructor or teacher in a traditional sense.” Knowles (1970) believed that serious noncredit adult classroom study could be classified as informal when contrasted to classroom study focusing on degree achievement. Thus, any given study must clearly define the term “lifelong learning” for it to make sense.

This section focused on the various meanings of “lifelong learning” during the 20th century. Much of the educational change in lifelong learning correlates with dramatic changes in society during mid 20th century and immediately following World War II. Although many, if not most, references to “lifelong learning” currently indicate a style of learning for enrichment throughout life, only a specific definition can clarify what the term means. The next section discusses the sociological and educational infrastructure associated with lifelong learning from multiple perspectives in the literature during this time period.

The Emergence of Postmodernism and Lifelong Learning

After World War II, a culture of rapid change, combined military and industrial growth, and technological and scientific expansion, among other influences, moved adult education into new territories. From a cultural perspective, America held new international status and positioned itself not only to influence the rest of the world from a cultural perspective, but also to dominate through technical sophistication by creating and entering the atomic age.

Grace (2000) argued that, during this period, higher education struggled and became fragmented. It attempted to negotiate a new role of cultural dominance as well as submitting to “regulations of techno-science and the rigors of professionalism” (p.2). Grace believed the ongoing tension between these two worlds led to a perennial struggle over the values of instrumental, social, and cultural forms of adult education. This struggle represents a plank in the floor of post-modern thought relative to higher education.

Referring to American higher education after World War II, Trow (1988) believed a unique feature resided in “diversity—both resulting from and making possible the...phenomenal growth—that has enabled . . . colleges and universities to appeal to so many, serve so many different functions, and insinuate themselves into so many parts of the national life” (p. 574). Anderson (as cited in Trow, 1988) noted America was fortunate after the war, in 1947, to offer education through 1800 colleges and universities—about half private and half public—to 2.3 million students. Although the system experienced stress due to a great influx of returned soldiers, American education expanded radically until the century’s end in size of student body, faculty, and revenue handling capacity.

Returning soldiers by the thousands made decisions to seek degrees, receive technical training, or develop trade skills—resulting in huge increases in nontraditional and adult education. However, adult education for the returning work force remained conventional and instrumental. Its purpose was still to retrain former military personnel who had become civilians, married, created families, and started the baby boom.

The emergence of a postmodern perspective created a new direction in educational thinking. Kilgore (2004) stated: “Postmodernists remind us that all modern ways of knowing, whether humanist, capitalist, feminist, Marxist, Christian, or critical theoretical, rest on some set of transcendental truths about being and knowing” (p. 46). Postmodernism rejected the validity of a transcendental nature of truth. Instead, it supported the belief that any claims of “transcendent” knowledge could lead to hegemony or total control if that knowledge served a particular group of people at other people’s expense.

Similar to Illich's (1973) concepts of deconstructing education, postmodernists rejected the idea of a teacher controlling students and the traditional concepts of the unequal social stations of teacher and student. These early roots of modern alternative thinking eventually led to the concept of the learner as self-facilitator and teacher as student facilitator in the educational environment.

With postmodern thought came concepts of multiple realities and localized forms of truth (Rosenau, 1992). Kilgore (2004) believed that, along with postmodernism, came major reconfigurations of knowing. The first of these represents the demise of any overarching knowledge. Thus, "the teacher's authority to know only exists within an authority-granting institution and by the will of the members who play by its rules" (Kilgore, 2004, p. 46). Once the rules of authority are subverted, participants in the learning process are "unfastened" from practices typically associated with relative authority or relative subordination.

The second postmodern reconfiguration reflects the multifaceted nature of knowledge (Kilgore, 2004). With this, numerous paths can lead to knowledge. A teacher knows relatively little compared to all there might be to know about any subject. The third reconfiguration addresses relocating authoritative meaning (Kilgore). Rather than meaning existing in texts, it resides within the mind of the learner. Teachers and learners only interpret language, and in that process, they bring meaning to texts.

Along with the deconstruction of traditional educational theories after World War II came an increase in institutional life in America and the world. Great increases in the number of huge corporations, large universities, super churches, and commercial franchises threatened postmodernists. They feared a world in which those institutions

dominated the individual's will. Illich's (1976) polemic response to the industrialized world included a critique of commodification of education. He feared that if learning becomes a commodity, like any commodity, it becomes owned, controlled, and scarce except for wealthy individuals. Illich believed that institutional influence caused a conversion of something productive, such as education, into something counterproductive. Hence, schools that attempted to educate would reach an institutional threshold and eventually become a detriment to the individual. This would produce a counter effect of their goal—enrichment of the individual.

Illich (1973) believed educational systems should provide opportunities and resources to anyone wanting to learn at any time in life. Similarly, he thought that those who wished to teach should also be able to openly and publicly share information and knowledge. His concept of “learning webs” included ideas recently embraced by lifelong learning organizations, such as reference services (i.e., libraries, laboratories, museums, and others), skills exchanges that permit people to freely coordinate learning interactions, peer-matching in communication networks, and locator services for professional and nonprofessional educators. These concepts are much closer to broad acceptance in the 21st century, especially in a lifelong learning context, than during Illich's life.

Other learning constructions were taking place almost simultaneously to Illich's (1973, 1976) works. Houle (1980) and Knowles (1970, 1973, 1984) provided insight into adult learners by attempting to define their needs in modern times and within the context of current educational systems. Knowles' well-known use of the term “androgogy” included the premise that the adult learner's self-concept, experience, readiness to learn, orientation to learning, and motivation to learn created a unique learning environment.

Knowles suggested that adult learning differs from youth learning but stopped short of defining the tenets of an adult learning theory.

More recently, Hase and Kenyon (2000) introduced the concept of “heutagogy” as the study of self-determined learning. Learning concepts supporting heutagogy stem from previous ideas in systems thinking, andragogy, and action learning. Hase and Kenyon challenged ideas about teacher-centered learning. They believe heutagogical learning endows the learner with the capacity to function proactively in the educational environment, to explore and learn from self-chosen and self-directed action. Heutagogy agrees with Illich’s (1973, 1976) ideas that emphasize the learner, who brings meaning to experience through self-assertion.

By following lifelong learning along its winding path to the end of the 20th century, the shift from authority-oriented teaching in traditional pedagogy to self-actuated learning in heutagogy exemplifies the sometimes practical and sometimes radical approaches offered by scholars and critics. Postmodern deconstruction and reconstruction spawned ideas about how Americans could live and began to recognize needs for adjustments in education. One area of academics, older adult education, gained focus and gleaned benefits from these changes.

Educational Gerontology

The social revolution of the 1960s spawned new awareness about the rights of women, minorities, gays, and other groups. Aging Americans began to recognize a need for many adjustments in their lives and in how others perceived them. Changes in life span, health care and status, and physical and mental activities in older people became the focus of academics worldwide. Aging populations became a larger part of the national

research agenda. Society heightened awareness that older people do not comprise a homogeneous group, but instead they represent a great diversity in health, abilities, and educational interests.

The term “educational gerontology” has existed at least since the University of Michigan initiated a 1970 doctoral program with that title. Peterson penned the following definition in 1976:

Educational gerontology is a field of study and practice that has recently developed at the interface of adult education and social gerontology. [It] is the study and practice of instructional endeavors for and about aged and ageing [author’s spelling] individuals. (p. 62)

A recognition of the University of Michigan’s contributions to educational gerontology must also include the work of Howard Yale McClusky, who established and chaired its graduate department of community adult education in 1948. He has been referred to as the “father” of the field of educational gerontology (Hiemstra, 1998). McClusky’s (1971) most well-known contribution was a background paper for the 1971 White House Conference on Aging. It became a cornerstone for significant movement in the field of educational gerontology (Hiemstra).

A key change in the literature revolved around redefining aging as a diversity issue rather than a phenomenon of physical and mental decline in old age. This required policy and practice considerations in the larger field of geriatrics. By adding a diversity concept to the discussion of aging, those invested in change began to advocate for representation of aging populations on committees, in advertising imagery, and in groups controlling organizational change.

This new orientation to aging followed decades of little change in a widely held perspective that characterized older people as living in a state of decline prior to death. In the traditional view, retirement from a career marked the end of “real” productivity and the beginning of decline in physical health. This view often included the concept of decline in intellectual and social abilities. The trend to associate old age with decline has continued until recently. Weaver (1999) believed changes to previous concepts of aging could be made through educational systems. He discussed myths that exaggerated health problems, loneliness, and financial difficulties in rhetoric about older people. Weaver believed that integrating nonbiased aging information into P-16 classrooms would help overcome these myths and even promote successful and productive aging.

Increasingly, older people defy conventional generalizations by continuing to contribute to society well into old age. Formerly conceptualized barriers from the 20th century and before no longer impose as much threat to aging populations. Although many barriers are currently being lifted for older Americans, problems remain in the educational field. For example, one study found that adults over 70 could overcome problems related to health, safety, and transportation more easily than problems associated with technology due to technology costs and problems with learning new technologies when seeking education (Purdie, 2003).

Since the 1970s, changing concepts of aging have also given rise to new terminology that reframes the meaning of old age. The emergence of the “young old” and the concept of the “third age” have been used to describe the period of time representing “leisure and personal fulfillment before the onset of the Fourth Age of descent into dependence, senility and death” (Withnall, 2002, p. 89). Certainly, the eventuality of

senility and dependence lacks validity, even in a “fourth age” environment, and some people even question the concept of death because of potential advancements in genetics research. Aubrey de Grey, the English biogerontologist, claims that some people alive now could live for 1,000 years or longer. De Grey stated:

Growing old is not an inevitable consequence of the human condition; rather, it is the result of accumulated damage at the cellular and molecular levels that medical advances will soon be able to prevent—or even reverse—allowing people to go on living pretty much indefinitely. We'll still have to worry about angry bears and falling pianos, but aging, the biggest killer of all, will cease to be a threat. Death, as we know it, will die. (Bartlett, 2005, p. A 14)

De Grey proposed “futuristic” solutions to seven of the top genetic and cellular problems contributing to aging and decline within life systems. Whether or not de Grey’s predictions about decline and death, and his solutions to the biomechanical problems leading to decline will hold true remains to be seen. Certainly, he commanded the attention of biogeneticists and gerontologists as they expand biological science applications to other research areas.

With changes related to aging prevalent in most facets of American life, many, if not most, older people flatly reject conventional aging stereotypes. Further, aging and education literature discredits adult development theory that defines life’s cycles as a series of predictable stages in today’s fast-changing society (Withnall, 1999). With the rejection of older aging models, new opportunities for educational models and programs have sprouted. One exciting “major achievement has been educational gerontology’s contribution to the development of intergenerational relations” (p. 96).

Examples of intergenerational learning experiences abound in Europe and America (Ohsako & Cramer, 1999). One such program exists within the University of Southern Maine's Osher Lifelong Learning Institute. Their International Friends Program matches interested institute members with students from their master's programs in the Sustainable International Development Program in the Heller School at Brandeis (University of Southern Maine, 2005).

In the University of Southern Main program, grandparent-aged individuals serve as mentors to college students, while students serve as sources of new information for their older mentors. Perhaps both partners serve an additional role of friendship and relationship building. Intergenerational relationships help create a sense of a community for both parties. This may be especially true in a university town where students and older people may feel isolated from their families. The potential for developing significant relationships may serve as a key motivator in intergenerational learning. The next section explores other motivators found in adult learning literature.

Motivation in Older Adult Learning

A considerable body of literature examines motivation for learning in adults. Few studies, however, consider motivations of older adults who choose to study formally in a lifelong learning setting. The previous section briefly discussed the dichotomy between enrichment learning and instrumental learning. The distinction between these two types of learning serves as a good starting point to discuss older adults' motivation to learn.

Manheimer, Snodgrass, and Moskow-McKenzie (1995) addressed the problems of using expressive and enrichment learning concepts by noting these categories blur quickly upon analysis. For example, learning how to prepare an income tax form could be

labeled instrumental learning—learning for a “further outcome or external objective” (p. 20). In this example, learning to prepare taxes helps a further outcome of saving money by doing the work and not hiring a tax accountant. Other instrumental purposes could also be served, including checking an accountant’s or completing tax preparation more quickly through one’s own resources.

A learning situation involving the study of 17th-century Spanish artwork clearly exemplifies enrichment learning, unless the participating person learns in order to facilitate an auction containing that specific type of art. In that case, the person would be participating in instrumental learning.

Other types of situations, such as an English-speaking person learning French prior to a trip to France, may also cloud distinctions between terms. The overall trip to France may be viewed as enrichment in nature. Learning the language may be instrumental to engaging in conversation during the trip. The ability to speak French undoubtedly would increase the trip’s enrichment value. Learning the language may also serve more of an enrichment function for the individual’s than learning tax accounting.

Manheimer et al. (1995) pointed out that various studies conclude that “older person’s motives for enrolling in formal and informal educational programs have yielded a wide disparity of results” (p. 21). Some research indicates that people are more likely to be instrumentally oriented, whereas other research concludes more dominance of expressive motives. There may be several reasons why motivation studies yield conflicting results. Manheimer et al. suggested that in survey-based research, “inconsistent finding may be the result of utilizing scales that lack psychometric validity” (p. 21).

Whether the motivations of expressive and instrumental learning constitute a continuous scale is arguable. However, it seems clear that both expressive and instrumental forms of learning occur. Unless the instrument used to examine learning processes provides valid, encompassing, and meaningful categories to the individuals responding, no results will tell the complete or accurate story. Further, the individual seeking a learning experience may or may not be able to define which of these purposes or motivations are operable in any situation. Leptak (1987) emphasized a need for further qualitative studies in motivation for learning. He noted that most motivation research has been quantitative and has fallen short of providing deeper insight about how older people think regarding their motives for learning.

Manheimer et al. (1995) stressed that a study of motivation in the context of lifelong learning should focus solely on the learners rather than depend on the interpretation of the institution offering the educational experiences. The administrators of an institution of higher education often believe they know what courses should be offered to participants in a lifelong learning institute. Administrators may know about the vast intellectual resources within the university community. However, the lifelong learning institute members may not be interested in a particular area of study, despite the best intentions of those planning the learning experience. These concepts clearly reflect Illich's (1976) earlier work that insists the learning needs originate from the individual seeking education.

Other authors focus on development of course materials or other factors external to the learner as possible motivators for older students. Wlodkowski's (1985) work in adult education focused on enhancing motivation to learn through improving instruction.

Petranek (2002) stated, “Experts agree that establishing the need is a prerequisite for motivating students” (p. 4). This instructor-centric perspective emphasizes the instructor’s role in relationship to the learner’s motivations for participating in an educational process. Petranek believed the “learner is more apt to conclude that there is a need to learn once the course material is made relevant,” and offered guidelines for “creating a motivating environment for . . . students” (p. 4).

Making materials relevant and ensuring a supportive learning environment obviously enhance learning in older adults. Yet, Manheimer (2005), Illich (1976), and Finger and Asún (2001) warned of problems that result when attempting to understand motivation emphasizing anything other than the expressed interests of the adult learner. This would be true even if the goals of an administration-run educational program included such admirable concepts as self-actualization, empowerment, and emancipation (Manheimer). The older learner may not identify with, understand, or embrace any specific goals or motivators offered by the program. By focusing on a diversity of adult learners and carefully attending to their expressed interests, educational facilitators help to avoid hegemony by higher education institutions.

Not all scholarship addresses motivation as a key concept in determining why an individual continues learning throughout life. Scott (2002) developed the concept of “congruous autonomy” to capture the concept of an older person’s commitment to extraordinary achievement. Scott defined congruous autonomy as “an enduring, self-efficacious belief in personal capability and compelling rightness and identity, inspiring commitment to extraordinary involvement in a pursuit (rich in lifetime patterns and trends), despite sacrifice and risk, to develop one’s highest potential” (p. 259).

Scott (2002) believed, after conducting in-depth interviews with eight informants over the age of 50, that they did not feel a “push” of perseverance. Rather they felt the “pull” of commitment to achieve beyond what others typically achieve. The value of Scott’s work is her new concepts and terminology to identify motivating and driving principles within the learner.

A quantitative study by Kim and Merriam (2004) researched older adults participating in a learning in retirement institute (LIR). They provided an adequate literature discussion, primarily from the 1970s to the present, relating to learning motivation in older adults. They adopted Boshier’s (1991) Education Participation Scale (EPS) to examine the primary motivational factors of older adults who participated in adult educational activities. The original EPS included seven factors: (a) communication improvement, (b) social contact, (c) educational preparation, (d) professional advancement, (e) family togetherness, (f) social stimulation, and (g) cognitive interest. The president and board directors of the LIR institute studied by Kim and Merriam suggested dropping three potential factors in the modified version of the EPS. Their final model included four factors: (a) social contact, (b) family togetherness, (c) social stimulation, and (d) cognitive interest.

One factor not included by Kim and Merriam (2004), “communication improvement,” contained subitems “to improve language skill” and “to write better.” Also, the factors of “educational preparation” and “professional advancement” did not appear in the final modified version of the EPS. Given that the typical person in their study was 61-80 years old, and 89.4% were retired, dismissing “professional advancement” as a factor makes sense, because retired people typically do not concern

themselves with professional growth. However, the study may have generated more interest had it included communication improvement factors. Many learning in retirement institutes offer courses that could be included in the category of communication improvement, such as writing and language skills.

Kim and Merriam (2004) found that “older learners are more influenced by cognitive interest to engage in learning than by any other factors” (p. 452). Perhaps because “almost 80% of respondents possessed undergraduate or advanced degrees,” (p. 451) they seek stimulating learning activities. Consistent with research, previous educational level represents the single-best predictor of participation in formal and informal educational activities (Merriam & Cafarella, 1999). Kim and Merriam also found participants in learning in retirement institutes were least likely to be motivated by social stimulation and family togetherness. Social contact was the second most important motivator. Kim and Merriam could have increased clarity in their results by offering a distinction between the factors of “social contact” and “social stimulation.”

Kim and Merriam’s (2004) research provides a glimpse at what may be considered obvious results—that older, white, middle-class adults seek learning opportunities and experience joy in the process. Although this may have remained an assumption without their specific research, additional research may help to establish more information about the nature of older lifelong learners. They also noted that “while many quantitative studies have been conducted on older adult education, far fewer qualitative studies have been conducted among this population” (p. 453). They continued, “Qualitative research can bring a deeper understanding of older adult participation in education and enable future inquiries into the underlying motives of older adults”

(p. 453). Thus, the qualitative research under consideration in this dissertation may provide an added dimension to the story of motivation and the lifelong learner.

Technology, Globalization, and Adult Learners

Lifelong learners find themselves in a world of massive change. Waves of flux include trends away from conventional educational concepts, shifts in processes related to a consumer society, emerging interests in a host of world religions and societies, rising awareness of both globalization and regionalism, overturning of small and large political systems, demographic change indicating increased numbers of older people in world populations, and the technological revolution. Perhaps the most significant of all of these, the technological revolution, reverberates miraculously and pervasively through education, medicine, transportation, and communications with an encompassing, yet opaque, sweep of change. We must remind ourselves that lifelong learning and all educational activities take place within this complex and ever-changing environment. New opportunities for lifelong learning exist in many cases because of this change.

With advances in communication tools such as the Internet and e-mail, lifelong learners access information more quickly than ever before. Despite advancements in technology, usage of technological tools by adults in educational settings has gained momentum more slowly than what might be anticipated. A 2004 NCES report based on a 2001 National Household Education survey indicated that 32% of adults enrolled in personal interest courses (i.e., not work-related) in college or university programs used TV, video, or radio in those courses. Only 19% used computers, and 8% used the Internet or World Wide Web (Kim, Hagendorn, et al., 2004, p. 28).

Even with slow gains in technology use in education by older people, this group continues to increase their use of computers in general. The Annenberg School Center for the Digital Future at The University of Southern California reported that in 2004 approximately two thirds of people 55 to 65 years of age and 38% of those over 65 used the Internet (The Digital Future Report, 2004). The same report noted that e-mail remains the single-most important reason people go online. A Microsoft research report (2003) indicated “as current 55- to 64-year-olds mature into their 60s and 70s, they will continue to use computers . . . In 10 years, there will be 2.5 times as many adults . . . [ranging] . . . from 65 to 74 years old using computers as [in 2003]” (¶ 4). The Microsoft report also noted this growth will come from increased use of computers by older individuals and increased population in older age groups.

Even with this growth, the mainstreaming of technology usage by some older adults in educational settings continues to lag. The phenomenon commonly referred to as the “digital divide” separates those who have access to technology options, including the Internet and e-mail, from those who do not or cannot access these media (SeniorNet, 2006). Older adults are commonly separated from technology users by this divide. Furthermore, women, individuals who did not attend college, and those over age 75 are less likely to use computers than are other older adults.

Technical Training for Adults

Training and education in technology for older people has increased dramatically in the past decade. In addition to being self-taught or helped by friends or relatives, older people have learned how to use computers and other technologies through classes in high schools, community colleges, universities, and recreation centers.

Many specialized organizations have also attempted to narrow the digital divide and increase technology competency in older adults. The AARP organization recently created the “Older Wiser Wired” initiative to “address just one facet of this very complex issue. [It] will bring together developers, designers, engineers, researchers, and older adults themselves to make technology—particularly computers and the internet—easier and more enjoyable to use” (Carpenter, 2005, p. 1).

AARP notes that a number of barriers to participation in technologies remain for older adults, including the cost of computers and Internet access, lack of basic computer skills, lack of perceived relevance, and poorly designed software applications and Web sites (Carpenter, 2005). Design choices including small type size, poor type contrast, and jargon-filled language reinforce the impression that online media offers nothing of value to older adults (Carpenter). SeniorNet, another example of a specialized program for older adults, provides computer education and access to computers and the Internet in order to enrich lives (Leavengood, 2001). SeniorNet enrolls over 39,000 members in 240 learning centers with classes led by volunteer instructors and coaches (Leavengood).

Adult Learners' Traits and Technology Needs

Many studies have explored adults' use of technology in educational activities. Mayhorn, Stronge, McLaughlin, and Rogers (2004) reviewed literature and data from a set of structured interviews and found a disparity between what older adults would like to learn and the content of computer training courses. They also provided a means of evaluating existing computer training programs specifically for older adults. Mayhorn

et al. offered practical suggestions such as maintaining focus on specific goals and interests of participants, not the teacher's agenda; encouraging self-pacing, separating students by skill level and experience, and avoiding instruction with technical jargon.

Similarly, Chaffin and Harlow (2005) found, while studying older adults who attempted to learn computer skills to enhance their lives, that careful planning and teacher preparation could help identify fundamental learner interests. According to Chaffin and Harlow, implementing instructional methods that reflect learner interests can lead to higher learner motivation.

Some studies offer specific suggestions for planning educational activities for adults using higher technologies. Jacko, Emery, Edwards, Ashok, Barnard, Kongnakorn, Moloney, and Saintfort (2004) found that experienced older adults responded better during drag-and-drop tasks on a computer when provided with multimodal feedback in the form of auditory, haptic (sense of touch), and/or visual feedback conditions. Users without experience responded well to auditory-haptic bimodal feedback but poorly to haptic-visual bimodal feedback. They recommend increased research utilizing multimodal feedback within diverse aging populations of computer users.

Austin-Wells, Zimmerman, and McDougall (2003) studied 34 African-American, Hispanic, and Caucasian community-dwelling elders. Participants took part in focus groups to determine the best format for presenting information. The study included a presentation utilizing flip charts, transparencies on an overhead projector, and a PowerPoint presentation. Participants rated the different formats and provided open-ended feedback about accessibility, novelty, visual preferences, and efficacy of material

presentation. Participants overwhelmingly preferred the PowerPoint presentation on every dimension.

Selwyn (2004) surveyed 1,001 adults and reported on the data from 35 randomly selected participants over the age of 60 from within the total interview group. He found a range of motivations stimulating older users to begin or continue using information and communication technology. Some respondents wanted to keep up with society in terms of technology. Others hoped to meet their families' expectations to use computers. Some used computers for specific projects. Others believed their history of computer usage within their profession provided a certain amount of status. By continuing to use computer technology in their personal lives, they believed they maintained their previous status as a computer user. He also found older people did not use technology for many reasons including cost, health problems, lack of exposure in the workplace, lack of general interest, perceived lack of usefulness of computers, and lack of opportunities to use computers.

About one third of the Selwyn's (2004) interviewees were considered heavy computer users, while the rest less extensively used computer technology. He noted that simply using a computer does not assure a permanent state of being a computer user. Instead, people are multifaceted and utilize technology for specific tasks, such as word processing, based on their interests and willingness to invest time and other resources in technology.

Selwyn's (2004) study concluded that many older people do not acknowledge computer use as relevant. He concluded that, rather than trying to change older adults through training geared towards increasing their use of technology, perhaps older adults

should be involved in changing the field of information and computer technology to be more attractive, interesting, or useful to their needs. In other words, until the computer and software designers begin to design with and for older people, those people are unlikely to invest heavily in the use of technology. Only time may change this scenario as baby boomers, who invest heavily in computer technology, retire and continue to use and design a wide variety of computer and information technology.

After reviewing current theory on cognitive aging, Jones and Bayen (1998) recommended that computer instructors design instruction to compensate for older adults' cognitive slowing, limited processing resources, lack of inhibition, and sensory deficits. Jones and Bayen provided a wide variety of tips on class setting, teacher behaviors, general teaching strategies, and other ways to empower older adults to learn. For example, they recommended adjusting the mouse double click and pointer speeds to slower settings. They also suggested using overviews at the beginning of each instruction unit to introduce and sum up material in each respective units. Many of their suggestions, such as self-pacing, allowing time for questions, and eliminating environmental distractions, make sense for older users and perhaps all computer students. These suggestions especially make sense for older adults with sensory deficits or limited processing capabilities. However, the great diversity of skills and abilities within adult populations age 50 and over make these types of adjustments difficult to implement without customizing instruction to a particular individual or group. Such customization takes additional time and resources that many education providers cannot afford or pragmatically assess.

This section discussed adult lifelong learners and their learning environment relative to information and computing technology. The diversity within lifelong learners obviates any homogenous approach to helping them adjust to and use technology while also addressing a variety of interests and abilities within this demographic group. These interests and abilities allow lifelong learners to use an array of recently available resources such as the Internet, e-mail, and other multimedia.

Literature Related to Paradigmatic Fit and Naturalistic Inquiry

This section focuses on literature identifying which research approaches are appropriate for understanding the perspectives of a diverse sample of lifelong learners. A basic set of beliefs guiding action comprise a paradigm, and a “paradigm encompasses three elements: epistemology, ontology, and methodology” (Denzin & Lincoln, 1994, p. 99). An epistemology answers questions about how we know the world, the relationship between the knower and the known. An ontology answers basic questions about the nature of reality. The methodology informs us how to gain information and knowledge about the content under study.

Any attempt to study a particular phenomenon, such as learning, must be grounded in a set of assumptions about the processes or reality underlying the phenomenon. We understand this from an ontological perspective based on our world view of the nature of being. Other assumptions help establish the possible limits of what we can know and the intellectual approach to research. We ask epistemological questions grounded in what we believe to be the nature of knowledge.

Various ontological and epistemological models of human nature lead researchers toward different methodological assumptions. If one believes the universe adheres to

general impermeable laws that can be discovered and articulated, analyzed, and deciphered, then a nomothetic approach, or one that is governed by law, will be chosen (Lincoln & Guba, 1985).

Much of the natural sciences approach knowing from a nomothetic base, along with hypothetical rules supporting the base. The nomothetic paradigm guides a researcher to objectify and quantify a particular phenomenon by attempting to control and manipulate the research objects to change outcomes in a test of the hypothesis. Instrumentation used to observe objects often use calibrated technology to assure neutrality by the observer. Data collection and interpretation help the researcher test the phenomenon for fit with the hypothesis and ultimately the law.

On the other hand, if one believes the universe behaves according to diverse realities, improvising its future, then multiple interpretations can transcend the nomothetic principle. Complex social phenomenon such as the relativistic nature of the social world compel researchers to rely on the experience of the individual for interpretation and meaning. An appropriate methodology helps a researcher access and understand the unique traits and experiences of a specific and ungeneralizable phenomenon or interaction.

Positivism Versus Naturalism

Positivism, a philosophy rooted in a very positive view of the “scientific conception of the world” (Matthews, 2004, p. 223), relies upon several underlying assumptions. These include an ontological assumption of a single tangible reality that can be broken apart into pieces; an epistemological assumption about the possibility of separation of the observer from the observed; an assumption of the temporal and

contextual independence of observations—what is true at one time and place may, under certain circumstances, be true at another time and place; an assumption about linear causality—there are no effects without causes and no causes without effects; and axiological assumption of value freedom—methodology guarantees that results of an inquiry are essentially free from the influence of any value system or bias (Lincoln & Guba, 1985).

Positivism became a dominant force in scientific inquiry during the 20th century but has lost favor with many educational researchers during the past two decades (Matthew, 2004). Lincoln and Guba (1985) expressed difficulty accepting the underlying assumptions of positivism. Denzin and Lincoln (1994) explained their view of the same problem:

Too many local (emic), case-based (idiographic) meanings are excluded by the generalizing (etic) nomothetic, positivist position. At the same time, the nomothetic, etic approaches fail to address satisfactorily the theory- and value-laden nature of facts, the interactive nature of inquiry, and the fact that the same set of “facts” can support more than one theory. (p. 100)

The naturalistic paradigm proposes an axiomatic base opposite the positivistic school. Lincoln and Guba (1985) offer five axioms of the naturalistic paradigm: (a) The nature of reality supports multiple realities that must be holistically studied. Each inquiry into these realities inevitably diverges from a previous inquiry, so prediction and control are unlikely outcomes; (b) The relationship of knower to known indicates the two are inseparable. The knower influences and interacts with the known and vice versa; (c) There is little possibility of generalization. The inquiry develops an idiographic (relates to

the particulars of the case) body of knowledge that describes the individual case; (d) There is an improbability of causal linkages. All entities are in a state of mutual simultaneous shaping so it is impossible to distinguish causes from effects; (e) There is a role for values in an inquiry. The inquirer influences a value-bound inquiry by: the choice of paradigm guiding the investigation; choice of the substantive theory used to guide collection and analysis of data and interpretation of findings; values that belong in the context, and with respect to the above influences, inquiry is either value-resonant (reinforcing or congruent) or value-dissonant (conflicting). Problem, evaluand (the thing being evaluated), paradigm, theory, and context must exhibit congruence (value-resonance) if the inquiry is to produce meaningful results.

Naturalistic Inquiry

The family of interpretivist research styles contains similar traits based on subjective and interpreted reality. However, in order to distinguish between naturalistic inquiry and other forms of qualitative research, specific traits must be included. To understand and operationalize naturalistic inquiry, Lincoln and Guba (1985) offered 14 implications that work coherently and synergistically together (adapted from Lincoln & Guba, 1985):

1. A natural setting—The inquirer carries out research in a natural setting because the ontology suggests that realities are wholes that cannot be understood in isolation from their contexts.
2. Human instrument—The inquirer elects to use him/herself or other humans as primary data-gathering instruments because it would be impossible to create a

nonhuman instrument with sufficient adaptability to encompass and adjust to the variety of encountered realities.

3. Use of tacit knowledge—The inquirer argues for the legitimacy of tacit knowledge in addition to propositional knowledge because often the nuances of multiple realities can be appreciated only in this way. Much of the interaction between investigator and respondent occurs at this tacit level because tacit knowledge more accurately mirrors the investigator's value patterns.

4. Qualitative methods—The inquirer elects qualitative over quantitative methods (although not exclusively) because they are more adaptable to dealing with multiple realities and more directly expose the nature of the transaction between investigator and respondent.

5. Purposive sampling—The inquirer typically rejects random or representative sampling in favor of purposive sampling. Even a simple random sample is representative because every element in the population has an equal chance of being chosen. The desired level of statistical significance, once tolerable levels of type I and type II error are specified, often determines the number of units to be sampled in conventional research. Sampling in naturalistic research is based on informational, not statistical, considerations. Purposive sampling often seeks the widest range of samples available through maximum variation sampling.

Sampling with naturalistic research does not focus on similarities that can be developed into generalizations. Instead, it supports discovery of the many specifics giving uniqueness to the context.

A second purpose is to generate information upon which an emergent design and grounded theory can be based. Purposive sampling increases the scope or range of data considered and the likelihood that the full array of multiple realities held by the research participants will be uncovered. There can be no a priori specifications of the sample; it cannot be drawn in advance. Naturalistic research uses serial selection of sampling units. The best approach to sampling requires selecting each unit of the sample only after the previous unit has been tapped and preliminarily analyzed. Each successive unit can be chosen to extend information already obtained, to obtain other contrasting information, or to fill gaps in the obtained information.

6. Inductive data analysis—The inquirer prefers inductive data analysis because that process typically identifies the multiple realities to be found in the data.

7. Grounded theory—The inquirer prefers to have the guiding substantive theory emerge from the data because no a priori theory could encompass the multiple realities that are likely to be encountered.

8. Emergent design—The inquirer elects to allow the research design to emerge rather than to construct it preordinately because it is inconceivable that enough could be known ahead of time about the many multiple realities to adequately devise the design.

9. Negotiated outcomes—The inquirer prefers to negotiate meanings and interpretations with participants from whom the data have been drawn because the inquirer seeks to reconstruct their concepts of reality.

10. Case study reporting mode—The inquirer prefers the case study reporting mode because it readily adapts to a description of the multiple realities encountered at any given site.

11. Idiographic interpretations—The inquirer typically interprets data in terms of particulars in the case rather than nomothetically through law-like generalizations because different interpretations are likely to be meaningful for different realities.

12. Tentative application—The inquirer seldom makes broad application of the findings because of multiple and different realities.

13. Focus-determined boundaries— The inquirer typically sets boundaries to the inquiry on the basis of emergent focus because that permits multiple realities to define focus rather than inquirer perceptions.

14. Special criteria for trustworthiness—The inquirer typically finds the conventional trustworthiness criteria of validity, reliability, and objectivity inconsistent with the axioms and procedures of naturalistic inquiry. There exists substitute criteria of credibility, transferability, dependability, and confirmability that adequately affirm the trustworthiness of naturalistic approaches (pp. 39-43).

The above research concepts based in a naturalistic inquiry approach remain vital for qualitative researchers today. The language identifying this general research style has changed to encompass a broader spectrum of research styles. The next section addresses this change in language and explains the scope and breadth of constructivism.

Constructivism Replacing Naturalism

Constructivism posits that individuals create knowledge by integrating new experiences with prior knowledge. Lincoln and Guba's (1985) concepts of naturalistic

paradigm align with the basic tenets of constructivism. By the 1990s, most literature embracing the naturalistic paradigm, including the work of Lincoln and Guba among others, utilized the term constructivism to create a broad understanding of their point of view. Thus, the concepts relating to Lincoln and Guba's naturalistic inquiry, the research approach in this study, align with constructivism.

To best illustrate the scope and meaning of the constructivist paradigm, Guba and Lincoln (1994) articulate how each of the fundamental structures of ontology, epistemology, and methodology relate to a subjective reality:

Ontology: Relativist—Realities are apprehendable in the form of multiple, intangible mental constructions, socially and experientially based, local and specific in nature (although elements are often shared among many individuals and even across cultures), and dependent for their form and content on the individual persons or groups holding the constructions. Constructions are not more or less “true,” in any absolute sense, but simply more or less informed and/or sophisticated. Constructions are alterable, as are their associated “realities.”

Epistemology: Transactional and subjectivist—The investigator and the object of investigation are assumed to be interactively linked so that the “findings” are *literally created* as the investigation proceeds. The conventional distinction between ontology and epistemology disappears, as in the case of critical theory.

Methodology: Hermeneutical and dialectical—The variable and personal (intramental) nature of social constructions suggests that individual constructions

can be elicited and refined only through interaction between and among investigator and respondents. These varying constructions are interpreted using conventional hermeneutical techniques, and are compared and contrasted through a dialectical interchange. The final aim is to distill a consensus construction that is more informed and sophisticated than any of the predecessor constructions (including, of course, the etic construction of the investigator). (pp. 110-111)

Lincoln and Guba's (1985) approach to the constructivist paradigm has been called "a wide-ranging eclectic framework" (Schwandt, 1994, p. 128) under the heading of "Naturalistic Inquiry" and made widely available by them in 1985. Lincoln and Guba have been using "constructivism" since the 1990s to characterize their methodology, "although they acknowledge that constructivist, interpretive, naturalistic, and hermeneutical are all similar notions" (p. 128).

This research attempted to use a pure form of naturalistic inquiry to reveal the thoughts of individual lifelong learners. Each of the 12 participants and the researcher interacted through a deep interviewing process. The researcher then constructed a case study that represented the diversity of ideas about lifelong learning held by the 12 participants in the study. Hence, this research problem focused on subjective realities based on multiple perspectives. The resulting case study, outcomes, and theory emerged from and are grounded in the data (Glasser & Strauss, 1967). This process carried with it the assumption that no a priori theory could have encompassed the multiple realities that were encountered. This section has provided an overview of naturalistic inquiry and how

it relates to the larger field of qualitative research including constructivism. The next chapter articulates the specific methodology used in this research study.

Chapter 3—Methodology

"Tact: the ability to describe others as they see themselves." –Abraham Lincoln

Introduction to Method Development

This research began in perhaps an ideal way. Questions about the thoughts and feelings of lifelong learners repeatedly surfaced in my mind. I, like many others concerned about how to approach a dissertation, struggled with methodologies, ranging from quantitative studies in which independent variables would be manipulated to find if significant results occur, to some type of qualitative study.

However, when I scrutinized additional literature, basic questions kept surfacing: What and how are lifelong learners thinking about themselves relative to the learning experience? How do they deal with lifelong learning? I believed the rich experiences of lifelong learners were waiting to be told in a way that had not yet been captured through research. The perspectives of lifelong learners in conjunction with their learning processes continued to emerge as the most important aspect of lifelong learning this research could help reveal. Despite concerns about starting a research study with only general questions about lifelong learners, I decided these questions were critical. I realized that decisions are sometimes made for lifelong learners when they are left out of the decision-making process.

Creswell (1998) believed that questions beginning with “how” or “what” lend themselves to qualitative research. General questions may arise because a lack of knowledge exists about the phenomenon being studied, or little or no theoretical base has been developed to explain it (Nassar 2001). This may be the case with lifelong learning in

2006 despite a considerable body of knowledge about adult education in the past half-century.

As I delve deeply into lifelong learning, many aspects remain a mystery. Perhaps because I, too, am a lifelong learner, I want to know more about my peers and how I fit into the many developments in lifelong learning currently taking place. By engaging in an in-depth analysis of how people my age or older understand themselves relative to lifelong learning, I and others may gain insight into education throughout the life span. Asking a specific group of lifelong learners what matters to them and discovering how they deal with those issues may help others understand key ideas and best thinking by the study's participants. Then, others can judge whether or not the ideas and stories in the resulting study are similar to or have application to another group, given the specific contexts of the other group.

The "Fit" of Naturalistic Inquiry

Eventually, I discovered a qualitative form of research, commonly referred to as naturalistic inquiry (Lincoln & Guba, 1985), that encourages researchers to start with the type of broad-based questions I had in mind. Naturalistic inquiry relies on discovering the thoughts of specific individuals in connection with a dimension of their lives, and then accurately reflecting those thoughts through a rigorously controlled study. That premise aligns perfectly with the purpose of this study—to describe and explain the in-depth process of lifelong learning from the perspectives of several diverse lifelong learners over 50 years of age.

To understand the meaning of "adult lifelong learners," the following description was used in chapter 1: "[Lifelong] learners have been actively engaged in learning

through formal activities, such as credit or noncredit short courses, in a university setting. However, their learning goals are not dominated by degree or nondegree programs that will advance a career, increase income, or create advantage relative to a profession. Instead, the learners in this study chose to engage in the learning process for the pure benefit of learning.”

Once the type of individual targeted for the study and the basic methodology were identified, the next step became understanding the implications associated with the methodology and mastering techniques recommended by Lincoln & Guba (1985). This chapter explains how I used naturalistic inquiry to move from pieces of information to a more holistic concept as the study revealed the complexities of lifelong learning from the participants’ perspectives. This chapter’s discussion should also help the reader understand the trustworthiness, verifiability, confirmability, and dependability of the study.

Naturalistic inquiry responds to historical criticism of qualitative research by using a rigorous approach to investigating, record keeping, documentation, triangulating information, information checking, and reporting. I began this study with confidence using a naturalistic inquiry approach because, of all qualitative research and perhaps all research, this approach represents the most rigorous form of investigation and reporting (Lincoln & Guba, 1985; Skrtic, personal communication, November 16, 2005). With naturalistic inquiry, the collected data become the ground for all other research dimensions through careful coding of data that can be traced throughout the research path. Furthermore, the grounding of data assures that a naturalistic inquiry ties any

emerging concepts or theories to the data source. A discussion of grounded theory follows.

Grounded Theory

Grounded theory provides a research approach that assures a connection between data and a theoretical premise. A grounded theory inductively derives from the study of the data and information collected from or representing the source of the research (Strauss & Corbin, 1998). The original concept of grounded theory by Glaser and Strauss (1967) used an iterative process called “constant comparison” where the researcher moved back and forth between data and organizing concepts, then eventually, to theoretical development.

Glaser and Strauss (1967) instructed the researcher to begin with a first step of “open coding” in which an event or idea is coded and then repeatedly compared to other coded incidents to see if they belong together in a temporary category. By using this constant comparison process throughout research documentation, the methodology “soon starts to generate theoretical properties of the category” (p. 106). The researcher checks these categories through an iterative process to assure that the categories eventually makes sense, although any category can change as new information becomes available or when other logical groupings seem superior.

Strauss and Corbin (1998) referred to the second step as “axial coding.” With this step, the categories resulting from the open coding analysis begin to cluster into other broader conceptual categories. During this stage, the research again returns to the data and to the open-coded incidents to check for appropriate fit within any given conceptual category or even to make sure the original fit with the open-coded group remains valid.

This process abstracts meaning directly from the data to the open-coded incidents. It then abstracts meaning once again from those coded incidents into broader conceptual categories, working inductively from the original data to the next two levels. Lincoln and Guba (1985) referred to these first two levels of analysis as unitizing and categorizing the information.

With the third level of analysis, identified by Strauss and Corbin (1998), the researcher utilizes “selective coding” to find linkages among broad conceptual categories. These linkages form through a selective process in which the researcher decides how or if these broad categories relate to each other. When the researcher determines that the connections make sense, the story of the research emerges. Harry, Sturges and Klingner (2005) “find it more explanatory to call Level 3 the ‘thematic’ level, referring to the underlying message or stories of these categories as ‘themes’” (p. 5). The figure on the next page illustrates the interview content and the three levels of analysis.

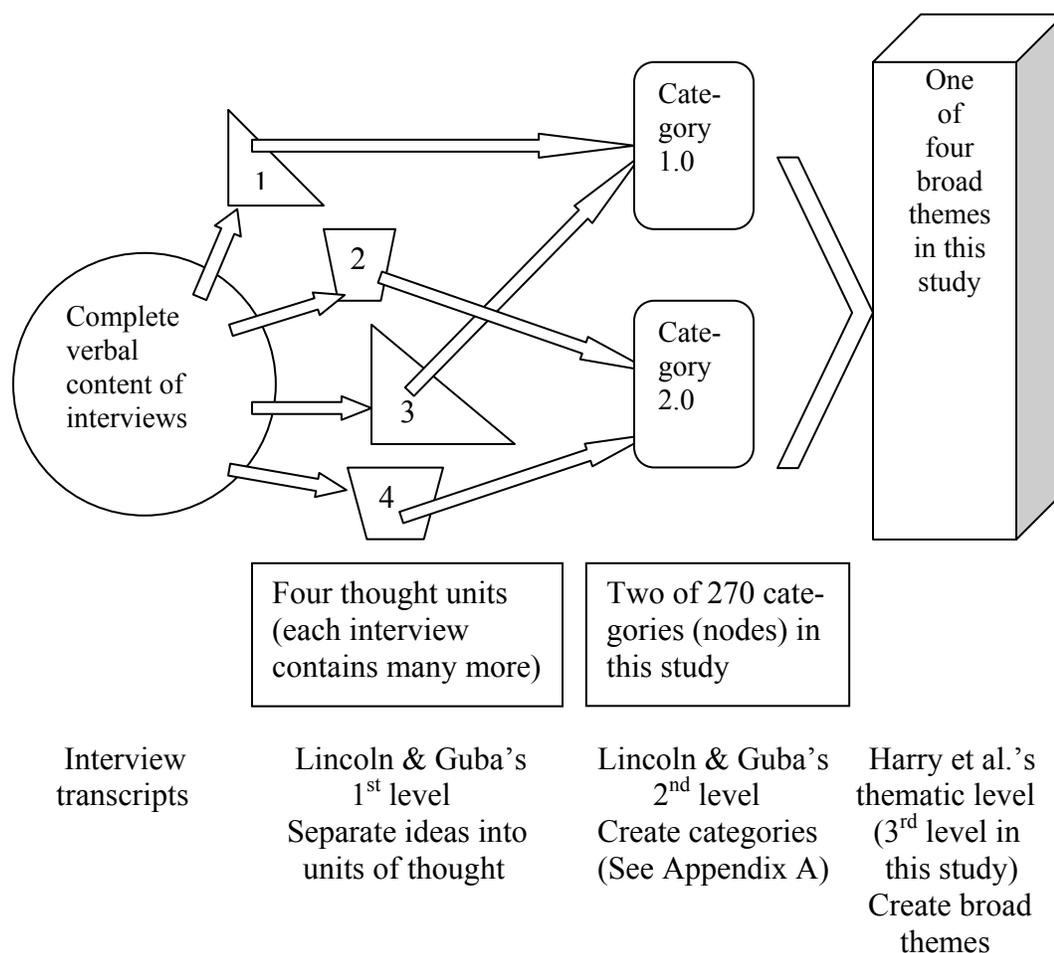


Figure 3. Conceptual model of unitizing and categorizing (Lincoln & Guba, 1985) and theme development process (Harry et al., 2005) by M. Hunt, 2006.

Ultimately, by discovering the interrelationship among the themes, the researcher builds the theoretical premise that becomes a recursive "search for consistency and logic" (Strauss & Corbin, 1998, p. 156). The new theoretical premise integrates all of the research strands including those that complement and those that compete for meaning. Through working up and out of the data to the first, second, and third level; creating a theoretical framing for the research; then moving back down and checking all levels for

coherence with the theory, the researcher works both inductively and deductively while remaining grounded in the research data.

Despite wide acceptance and use of naturalistic inquiry in qualitative research, it has not survived without criticism. Glaser (2004) noted the differences between his concepts of grounded theory and those used in naturalistic inquiry by stating he had:

...no issue with it [naturalistic inquiry] with respect to its application to QDA [Qualitative Data Analysis]; it helped clarify and advance so many QDA issues. However, its application to Grounded Theory (GT) has been a major block on GT, as originated, by its cooptation and corruption hence remodeling of GT by default. Lincoln and Guba have simply assumed GT is just another QDA method, which it is not. (¶ 1)

Glaser's concern about naturalistic inquiry stems from the approach to, or meaning of, grounded theory in research using naturalistic inquiry. Glaser and Strauss's seminal 1967 work contrasted grounded theory, in which theories develop directly from data during the research, with grand theory, in which theories are logically deduced. Glaser saw grounded theory as a research approach that uses a broader set of tools including the potential for quantitative and qualitative methods to conceptualize data but not to describe it (Glaser, 2005, ¶ 65).

Lincoln and Guba (1985) used what they consider to be grounded theory in order to build theory from the data in a qualitative study rather than using an a priori approach to theorizing. This research utilized an application of Lincoln and Guba's concepts of grounded theory because it has been used in numerous studies across many disciplines. It has provided results that have withstood the tests of trustworthiness and authenticity

relative to deeper contextualized understandings of an array of issues from multiple perspectives (Denzin & Lincoln, 2005).

This qualitative research adhered to Lincoln and Guba's (1985) naturalistic inquiry by undertaking a holistic approach to research without creating methods to manipulate the setting under study or to predetermine which variables should be measured (Patton, 1980). Key participants included the lifelong learners and the researcher. The researcher, or inquirer, interacted with lifelong learners throughout the investigative process and attempted to provide a voice for this research through creating a case study and supporting documents.

Authorial Presence

As with most research, use of voice in research writing facilitates understanding the interaction between the researcher and other participants in this study. Conventional research employs a "neutral" third-person voice. Third-person voice in conventional positivistic research creates a sense of objective authority, providing facts and limiting any overtly subjective point of view by the author. Literature based in this voice often renders emotions of the characters, including the author, unavailable to the reader. Any emotional content or personalized thoughts by the author seem indirectly available at best.

Researchers, however, inherently constitute a significant part of the research whether the writing acknowledges the inquirer's subjective voice or not. Because this research requires a writing style that reveals the interactions between researcher and participants, exposure of the inquirer's subjective voice is important and appropriate in relationship to the positions and directions he chose for the study.

The first two chapters provide contextual information and are written as academic papers in an objective, third-person voice. In this chapter, however, I acquaint the reader with specific insights, rationale, and methods of analysis by introducing a first-person writing style. Creswell (1998) refers to first-person perspective as authorial representation. Balance in the authorial presence depends upon whether or not the amount of first person use increases the reader's understanding of the research, explains the relevance of the author's perspective, and leads to the reader's understanding of the data (Scott, McCaslin, & Alexander, 2003).

At points throughout the rest of this study, I carefully evaluate and employ a narrative style through first-person singular writing when discussing my actions or when providing a reflexive inner dialog. I also use a personal form of writing when engaging you, the reader, or directly addressing you, as I am now, by using second-person in direct dialog. This narrative style provides another way to disclose my position, explain my subjective thoughts about the participants, and provide an authorial presence (Richardson, 2000; Wolcott, 1994; Scott, McCaslin, & Alexander 2003).

This writing methodology also helps reveal my personal biases as one of the many realities found in the study (Lincoln & Guba, 1985). By revealing such information through a writing style you should be able to judge more accurately the credibility and trustworthiness of the research. The personal connection between my thoughts, as represented through authorial presence, and the lived experiences of the respondents create further value in this research. Because the researcher's role in a naturalistic inquiry requires a significant level of interaction and involvement between researcher and participants, a discussion of the researcher's role in this study follows in the next section.

Instrumentation and Role of the Researcher

The researcher served the key role of the human instrument, the primary instrument for data collection and analysis in this study. McCaslin & Scott (2003, p. 453) note, “Just as the artist is the primary instrument in painting, the researcher is the primary research instrument in qualitative investigation.” Though McCaslin & Scott’s comments parallel the human instrument with the role of the artist, Lincoln and Guba (1985) found the role of the human as instrument to be quite functional and utilitarian for several reasons: (a) responsiveness, (b) adaptability, (c) holistic emphasis, (d) knowledge base expansion, (e) processual immediacy, (f) opportunities for clarification and summarization, and (g) opportunity to explore atypical or idiosyncratic responses. Lincoln & Guba (1985, pp. 193-194) explained their view of the human as instrument in research through the following descriptions (paraphrased):

Responsiveness—The human-as-instrument can sense the environment and understand and respond to clues in that environment. Through interaction with the environment, the human instrument makes sense out of it and makes the environmental responses explicit.

Adaptability—Even though the human, as any instrument, falls short of perfection, the human remains highly adaptable to almost any social circumstance and therefore infinitely adaptable. By multitasking, humans can attend to numerous stimuli without preprogramming or additional design work that might be required for most inanimate instruments. This does not mean that humans-as-instruments should not receive training in order to maximize their abilities in research.

Holistic emphasis—Almost any social situation offers multiple layers of experience, meaning, or activity. The human may be the only instrument capable of grasping all or as much of this phenomenon as it does.

Knowledge base expansion—Humans have the capability to extend awareness simultaneously not only to propositional knowledge but also to tacit knowledge. Humans can recognize on some level the unconscious responses and lend depth and richness to the social setting.

Processual immediacy—Only the human instrument can process data immediately when it becomes available and generate hypotheses on the spot. Furthermore, the human instrument can follow up by testing those hypotheses along with the respondent within the same environment in which the hypotheses were created.

Opportunities for clarification and summarization—A human can document, clarify and summarize data by looking for good opportunities to do so. Through the process of clarifying and summarizing data, a human can interact with the respondent to correct, amplify, diminish, or delete any particular part of the data.

Opportunity to explore atypical or idiosyncratic responses—In conventional research, an atypical response may not fit a data collection scheme and thus may need to be discarded. A human can explore any response to test its validity and to achieve a higher level of understanding than what might otherwise have been possible.

Because of the highly adaptable capabilities of the human as an instrument of data collection in social science research, the human/researcher served the primary role of data collection in this study rather than using questionnaires, surveys, or focus groups. The other tools (questionnaires, etc.) must, by their design, contain previously determined

questions. Thus, they must guide the respondent in the type of categories requiring response, a less than desirable result according to Lincoln and Guba (1985). The human element, complete with biases, inefficiencies, and limits, serves as the key to understanding the complex and highly varied responses anticipated in this research. The researcher must make these biases and limits explicit for the reader so the reader can determine for him/herself the meaning of the research.

Site Selection

The sites associated with individual lifelong learning attach directly to the lifelong learners involved in the research. This contrasts with studying individuals in an organizational setting in which there may be a particular site, such as a school district or a business operation, in which the activities take place. Learning takes place within the individual, so on a basic level the individual's mind served as the site in this study. In terms of the physical world, Guba and Lincoln (1985) encouraged the use of a naturalistic environment, as opposed to a clinical or artificial setting. The physical location at which each participant and the researcher met included the lifelong learners' and the researcher's homes, a coffee shop, a store owned by one participant (prior to the time the store opened), and a few telephone conversations.

Skrtic (1985) indicated that Patton's (1980) six purposive sampling strategies were useful "not only for sampling respondents...but also for sampling sites...and units within sites" (p. 187). Patton's six strategies included sampling extreme or deviant cases, sampling typical cases, maximum variation sampling, sampling critical cases, sampling politically important or sensitive cases, and convenience sampling (Lincoln & Guba, 1985). The next section offers discussion regarding sampling respondents. However,

Patton's categories of sampling for respondents also influenced site selection, since respondents and sites are inherently tied together in this study. In general, sites were selected to increase diversity and include a wide range of response, as opposed to representative sampling in which site selection can and often does minimize diversity.

Sampling Respondents

Naturalistic inquiries commonly begin without preconceived notions (Lincoln & Guba, 1985), as did this study. Thus, convenience sampling, as described by Patton (1980), served the purpose of the initial sample. Sampling proceeded serially and selectively in an attempt to provide the variation recommended by Patton throughout his work. This study attained variation in lifelong learners' thoughts by sampling a range of genders, ages, socio-economic backgrounds, and educational levels.

Purposive sampling has several additional characteristics that help clarify its purposes (Lincoln & Guba, 1985). The first, emergent sampling design, requires no a priori specifications of the overall sample in advance of the research. Second, purposeful sampling uses mostly serial selection of sampling units. The purpose of maximum variation includes selecting each sampling unit after the previous unit has been sampled and analyzed, at least to some level of analysis. Each successive unit can be chosen to extend information or contrast information, fill in information gaps, or test previous ideas. The third characteristic includes a continuous adjusting or focusing of the sample. Guba & Lincoln believe "initially any sample unit will do as well as any other, but as insights and information accumulate and the investigator begins to develop working hypotheses . . . the sample may be refined to focus more particularly on those units that seem most relevant" (p. 202).

Fourth, selection in purposive sampling utilizes selection to the point of informational redundancy. Conventional research typically designates sampling size as part of the research design. The N is determined by the degree of statistical confidence desired to place the results within levels of statistical confidence. Once tolerable levels of type I and type II errors are specified, the size of the sample may be determined. With purposeful sampling, in which the desire is to maximize information, “the size of the sample is determined by informational consideration . . . when no new information is forthcoming from newly sampled units Thus redundancy is the primary criterion” (Lincoln & Guba, 1985, p. 202).

Naturalistic inquiry may draw criticism for its inability to yield generalized results. Although this is true, it serves other purposes, including the close portrayal of the perspectives of people sampled in the case. Conversely, much quantitative research lacks an understanding of the perspectives of unique individuals. Instead it attempts to generalize data. Thus, these two approaches serve different functions in research.

Patton extended the previous discussion about the critical concepts for sampling within qualitative research by providing sampling guidelines. Patton (1990) believed the “logic and power behind purposeful selection of information of informants is that the sample should above all be ‘information rich’” (p. 169).

Patton (1990) clarified and refined the earlier six concepts from 1980 by discussing extreme or deviant cases, intensity sampling, maximum variety sampling, and critical case sampling. Although these are similar to the earlier six concepts, differences exist and emphasize a shift in his thinking. For example, both publications discuss

extreme, maximum variation, and critical sampling. However in 1990, Patton deemphasized typical, politically important or sensitive, and convenience sampling.

Patton's (1990) concepts of extreme or deviant case sampling include selecting participants who exemplify characteristics of interest. For example, with lifelong learners, participants of extreme age who purposely pursue lifelong learning outside of career interests may fulfill one aspect of extreme sampling. Initially, this study included a person over 90 years of age as a sampling target. The researcher located two individuals who matched this quality. However, when interviews had to be scheduled, both of the individuals either lacked the ability to sustain conversation or were experiencing health concerns. One 85-year-old was included as a participant and represents the extreme in age of all samples.

Patton's (1990) concepts of intensity sampling place less emphasis on extremes and select participants who are experiential experts or authorities. This study operationalized this concept by interviewing a person who has been professionally involved in education over a period of decades. Thus, the person was an expert in education and learning and offered considerable insight about what he saw as a lack of difference between instrumental and enrichment modalities of lifelong learning. Most of the other participants simply enjoyed learning as part of what they did for enrichment.

Patton's (1990) concepts of maximum variety sampling deliberately steered the researcher toward a heterogeneous sample for observing commonalities in experiences. This style of sampling works well to explore abstract concepts such as peace in people from varied backgrounds who emphasized peace in their lives. Any selected group of lifelong learners with an established record of formally studying throughout their lives

could be interviewed in order to understand what the concept of lifelong learning means to them. This study attempted to maximize variety in the samples and, in doing so, located men; women; people in their 50s, 60s, 70s, and 80s; whites, blacks, and a Hispanic person. These participants also represented a wide variety of educational and career backgrounds.

Patton's (1990) concept of critical case sampling included analysis that focused on instances, attributes, or key factors that contribute significantly to the example. A sample in this study included several people who had significant experience with what might be considered a pure enrichment style of lifelong learning, and each of them contributed important information to the study.

Key Participants

Initial planning for the first site visit included 11 lifelong learners, most of whom did not eventually participate in the research. Twelve lifelong learners were ultimately selected based on their qualities and ability to participate. These learners ranged from approximately 51 to 85 years of age and included males and females, people studying within and outside of a lifelong learning institute, a Hispanic, African-Americans, and whites. To preserve the anonymity of participants and settings, real names have been changed throughout this research and pseudonyms have been used instead. The sampling approach involved starting by interviewing a participant and then pursuing additional interviews by seeking diversity and contrast in comparison to the previously interviewed person. Table 1 provides basic information about participants involved throughout the study.

Table 1

List of Participants with Gender, Age, and Other Characteristics

Name	Gender	Age	Characteristics
Chester Burnett	Male	85	Retired social worker, businessman, regular LLI* member
John Hurt	Male	53	Store owner, historian, writer
Bess Tucker	Female	77	Retired business administrator, regular LLI* member
Alex Miller	Male	55	Retired store owner, wood craftsman
Mac Morganfield	Male	53	Builder, former educator, gardener, regular LLI* member
Mary Reed	Female	65	Artist, introvert, regular LLI* member
James Reed	Male	65	Professor, artist, African-American
Ethel Waters	Female	80	Foreign-born, retired librarian, regular LLI* member
Liz Douglas	Female	51	Semi-retired occupational therapist, artist, regular LLI* member
Beulah Thomas	Female	62	Semi-retired social worker, regular LLI* member
Gertrude Rainey	Female	69	Retired university administrator, community service focus, African-American
Sam Samudio	Male	69	Retired school administrator and counselor, Hispanic

* Lifelong Learning Institute

Data Collection and Recording

A wide range of data collection and documentation provided a base for writing the thick description (Geertz, 1973). It contextualized the case study report and provided analysis leading to the outcomes of the case study. This study used interviews, observations, documents, and unobtrusive measures in data collection. Notes were collected in the field; documents were archived in electronic and hard copy; and journals, schedules, and logs were used to record information and thoughts about the research process.

Interviews

Interviews served as the primary source for data collection in this study. The interviewing style used “grand tour” questions to initiate an interview exchange between the researcher and participants (Spradley, 1979). Other types of interview questions were also used to capture a range of information. Spradley developed five major categories of descriptive questions: (a) grand tour, (b) mini-tour, (c) example, (d) experience, and (e) native language.

Starting an interview with a grand tour question required a very broad focus and included the question: “What’s it like being a lifelong learner?” Note this example does not ask about a specific type of lifelong learning activity but instead allows the interviewee to start by generalizing about some aspect of his/her choosing. This response allows the interview pair to start constructing general schema upon which other specific information can be built. Another slightly more focused grand tour question related to lifelong learning included: “What is a typical day like for you in which you engage in learning?”

Spradley (1979) also suggested that a second type of grand tour question can be formed with even more specificity. When the interviewer has specific awareness about a set of activities by the interviewee, she/he may refer generally to those activities. This included questions such as: “Can you tell me more about the learning groups you mentioned you attend?”

Mini-tour questions arise directly out of grand tour questions. When the interviewee responds to a grand tour question, the interviewer might notice details that could be further pursued. When responding to a grand tour question, one of the participants offered information about how he enjoyed using the library to find information. The researcher asked him to explain the types of information he sought at the library.

Like mini-tour questions, example questions stem from answers to other questions. For instance, when an interviewee mentioned she had experienced frustration about never attaining a doctorate, the researcher asked her how she deals with that frustration and if she remains frustrated at this point in her life.

Experience questions ask the interviewee to describe an interesting experience. The researcher asked a participant who mentioned she grew up in England a leading question and other follow up questions about her experience. In the transcription below, the letter “I” equals inquirer and “P” equals participant:

I: So you grew up in England in the 20s?

P: In the 30s, I was born in 1925. The time I’m talking about would be probably early 1940s. Round about 1940 I started going to those evening classes.

I: So you would have been 15 or 16?

P: Yeah, yeah.

I: And did you get credit for those from your high school?

P: No, no. This was just because some of my family members went.

I: What did you study then? Do you remember what the classes were?

P: There was one, they tended, some were 1-year classes, some were 3-year continuing classes. I know there was one on English History; I've been trying to remember what particular period it covered; I think 19th century, probably. There was another, I didn't do all 3 years of it, there was a 3 year course on English literature and I think again I did probably only 1 or 2 years of that. That was again probably a long time ago. I think poetry one year and the novel another and drama. I know we had to do a certain amount of written work for that, again no credit. In the early 1940s there was a short course on Russia when we realized the USSR was on our side and not theirs. Then later on, this is considerably later after I'd been through college and out again, certainly there was one on the Bible as literature.

Obviously, the respondent provided a nice amount of background information due to questions the inquirer generated about her experience.

Native language questions are used to find out how to talk about particular experiences. One participant, an artist and professor, had mentioned his passion for photography, architecture, and literature about art and architecture. The researcher used language related to the expressive arts, including a metaphor (the word "interwoven") for the interdisciplinary approach taken by the participant regarding his art and a reference to

a specific musician. The following dialogue illustrates use of native language (I is inquirer; P is participant):

I: So that seems to be very interwoven is the word that comes to mind.

P: It is kind of interwoven with my work still. Yeah. And it's a tax write off [laughs] when it comes down to that. But you know, it's not much of anything else, you know, like I almost don't enjoy, although I would, but I don't necessarily enjoy sitting at the beach. I mean when I grew up in Philadelphia we would frequently go to Atlantic City and so on. But it never, of course I was always the 98 pound weakling, the guy would come and kick sand in my face. But especially as a kid I was very skinny. But still, the whole appeal of that, and I don't do that that much, were just relaxing and having a drink and letting nature wash over me.

I: So you are motivated by what you have invested your life's work in is what it sounds like to me. Whether that may be visual arts or architecture.

P: That's it. Yes. Music. I love music.

I: Music, going to see James Brown [participant had mentioned James Brown earlier].

P: Right.

I: But that's all still artistic expressiveness isn't it, in one form or the other, is what motivates you, perhaps? I am not sure if that's how you'd say it.

P: Well, yeah, but that is. Those are just the things I find interesting. The expressive arts. I mean, I love music. I have a pretty decent CD collection that's very eclectic. It's not that focused. And I'll go to see music performances or, as I

say, dance is kind a combination of music and movement. So we [the participant's wife and he] find that's enjoyable in common.

I: So, would it be fair then to say that what motivates you is seeking more new and varied experiences in the arts and expressive arts and architecture? What motivates you is to continue learning in that regard?

P: Yeah, yeah. Yeah.

I: Yeah, OK. I remember you telling me about your music collection last time.

P: Yeah, well you know, even as a kid growing up. You know I grew up in Philadelphia, Pennsylvania, they had a couple of jazz clubs there. But the problem with Philly is you had to be 21 to drink. And in New York at that time you could drink at the age 18, and so we would frequently take bus trips up to New York City to get into, you know some of those, they had Miles Davis at the 5 Spot, and you know a lot of these historic clubs. I've actually—Village Vanguard, you know all those places we would go because for some reason you know like jazz was hip, jazz was cool. And we went to see these guys live and so on and so forth. So, it's always been kind of focused in that way. I wouldn't just go to a bar to hang out.

I: So that's a long-term, lifetime interest, has been those expressive arts and music?

P: Right.

The interview transcription above includes grammatical errors and disjointed speech in several locations, a fairly common phenomenon throughout the interviews. Yet, by probing and checking back with the participant, the researcher learned a broad range

of information about the participant's passion for the expressive arts as well as his long-term interests. Throughout the interviews, the collection of a diverse range of information resulted by using the various styles of questions while conducting insightful and responsive questioning, careful listening, and accurately documenting interviews.

Discussion in the section, "Recording Tools and Data Collection Methods" explained how interviews were documented, coded, and archived. Also, a discussion about the phases of research explained in greater detail how the approach to interviewing changed during the research process.

Observations

The naturalistic research trail led the investigator to observations relative to lifelong learning. Observations provide another data source that may triangulate information attained during interviews. Observations of the homes, behaviors, and art of lifelong learners constitute the types of observations in this study. This study applied the same methods of documentation for observations as it did for interviews by using field notes and coding the who, what, when, and where of observations.

Documents and Records

Hodder (1994) stated that documents and records represent different types of archives. Similar to Lincoln and Guba's (1985) concepts, Hodder's theory notes the distinction between documents and records involves whether or not text was prepared to attest to some formal transaction. Records are prepared for formal or official transactions; and documents are prepared for personal rather than official reasons. Records include items such as "marriage certificates, driving license building contracts, and banking statements . . . [whereas] documents . . . are prepared for personal rather than official

reasons and include diaries, memos, letters, field notes, and so on.” (Hodder, p. 393).

The documents used in this study include field notes, written statements by participants, and printed documentation of participants’ web sites. Records were not used in this study.

Unobtrusive Measures

Lincoln and Guba (1985) noted it is “reasonable to expect an inquirer to provide sufficient information about the context in which an inquiry is carried out so that anyone else interested in transferability [of the outcomes] has a base of information appropriate to the judgment” (p. 125). In order to create a “thick description” as defined by Geertz (1973) and “sufficient information (Lincoln & Guba), the inquirer can use a range of tools such as direct observation, interviews, documents, and unobtrusive measures as the raw information for the study.

Unobtrusive measures can be physical traces, archival records, private records, and simple observations. These measures or “informational residues” (Lincoln & Guba, 1985, p. 280) accumulate during the research study without intent on the part of either the inquirer or the participant. The way a participant laughs or shows stress or the attendance patterns in lifelong learning classes represent types of unobtrusive measures. The inquirer does not need to intrude upon the participant in any overt way or even with the participant’s awareness to collect such traces of information.

A considerable history exists on the use of unobtrusive measures in the research literature (Webb, Campbell, Schwartz, & Sechrest, 1966; Web, Campbell, Schwartz, Sechrest, & Grove, 1981). Eisner (1998) encouraged the inquirer to use unobtrusive measures to add new information that might otherwise be difficult to collect. By

developing an eye for unique situations or phenomenon, the inquirer can add supportive and enriching new information to the case.

In this study, one example of information gained from an unobtrusive situation indicated how important one idea was to a participant. The participant called the inquirer and left a voice message to indicate that she *always* applies the things she learns. This behavior of applying learned information was again emphasized by the participant during her second interview. Value was added to the research for this participant's information, because of the phone message.

Recording Tools and Data Collection Methods

The data collected from interviews, observations, documents, records, and unobtrusive measures are archived in handwritten notes, electronic computer files (e.g., word processor, specialized database, and spreadsheet files), and printouts from computer files. Texts include entries to a methodological log, a personal journal, a schedule of activities, and documents and records files, including their indexes.

Consistent with good research practice, the data collected for this research remains confidential. Pseudonyms are used in place of actual names to maintain confidentiality of participants and the specific research site. Only members of the dissertation advisory committee, the auditor, and the peer debriefer (more information about the auditor and peer debriefer may be found in the following sections) for this study can access the real identities of participants.

Interviews were recorded on audio cassette tapes and by handwritten notes on paper printed with a specific interview template. The interview document used a coding system that allowed the interviewer and the auditor to know the identities of the

interviewer and interviewee, when and where the interview took place, and from which phase of the research the interview document was created. This coding system helped track all information through the research system, into the dissertation, and back to the handwritten field notes.

The interview method used other coding in a designated margin area in the interview template sheet to note behavior or environmental signals. For example, if the interviewee expressed great joy through laughter or sparkling eyes or emphasized frustration through a vocal shift or frown, coded notes explained and documented these signals quickly without taking time away from other textual documentation. Some of these expressions were also captured on the audio tapes. The combination of audio tapes and handwritten notes helped to assure accurate coverage of the interview activities.

The audio tape recordings of the interviews were transcribed verbatim in a word-processed file. Then the electronic transcripts were coded to categories of thought and then eventually to broader thematic categories. Further discussion about the unitizing and categorizing of information follows in the section labeled “Data Analysis Procedures.”

Aside from the interview transcriptions, several other infrastructure tools helped archive information and facilitate and control the research process. These include the personal journal, a schedule of activities, a methodological log, and document and record file archives.

Personal Journal

A personal journal recorded the researcher’s thoughts about the interview process, provided general reflections on the study, allowed venting of frustrations and insights,

and documented any other reactions or creative thoughts (See Appendix B for sample).

The researcher's inner dialogue as indicated in the personal journal provided insight about biases as well as questions and hypotheses that emerged throughout the course of the study. The researcher utilized this information, when appropriate, in the methodological log and in the case study.

Daily Schedule of Activities

Documentation of daily activities included listings of interviews, observations, and unscheduled interviews and observations (See Appendix C for sample of Daily Schedule of Activities). The researcher relied on the schedule of activities to help control and document the chronological processes of the research throughout the investigation. The schedule of activities also provided the auditor valuable information for checking the logistics of the research path.

Methodological Log

To be dependable, a naturalistic inquiry must show how decisions are made and what methods are used (Lincoln & Guba, 1985). The methodological log provides documentation of many aspects of the inquiry and includes ten informational categories: (a) general description of the study, including what was studied and why; (b) justification for sampling in each of three research phases; (c) guiding questions and protocols; (d) category outlines (i.e., After interviews are broken down into units of thought, those units are grouped into categories. The categories are then placed in a working outline until final categories emerge.); (e) interview tapes, notes, and observation notes; (f) lists of all documents, tapes recordings, and records; (g) personal journal; (h) consent forms; (i) trustworthiness documentation on credibility, transferability, dependability, and

confirmability; and authenticity criteria documentation (j) the final negotiated version of the case study report with audit trail references and without audit trail references, and revision rationale for the case study report.

Using the methodological log during research helped the researcher by providing retrievable archives and an organized source for analyzing the research project.

Ultimately, the completed methodological log provided documentation of the research project and also substantially supported the writing of this dissertation.

Document and Record Files

Documents and records collected during the course of the investigation were archived in three-ring binders. The documents were coded to indicate if they represented interviews or observations, the date, the participant represented, the phase of research, and other notes.

A combination of interviews, observations, and documents compiled from a diversity of sources helped support the researcher's interpretations of the meanings of lifelong learning. By using all of these information sources, the inquirer confirmed, disproved, and theorized in order to enrich the inquiry's context and meaning.

Data Analysis Procedures

Data Analysis

The naturalistic inquiry approach used in this research developed meaning through iterative cycles of gathering and then interpreting data. Because this research required several phases of work, the developmental nature of data analysis resulted in an ongoing process rather than a specific event. For example, an interview conducted one day became data analysis for another day, which then created more questions and led to

additional interviews. As these analyses continued along the research path, increased focus on rich areas of response, due to quantity or quality of responses from participants, drove the research towards four emerging themes.

This study used a modified version of Glaser and Strauss's (1967) "constant comparative method" as the analytical procedure for scrutinizing transcripts and other documents. This modified analytical method, proposed by Lincoln and Guba in 1985, allows the researcher to develop grounded theory—one that derives from the study. This differs from the use of theory in the quantitative paradigm. In 1994, Janesick explained how grounded theory had progressed in its application to education research:

Instead of proving a theory, the qualitative researcher studies a setting over time and develops theory grounded in the data. This is a well-established methodology in social psychology and sociology. Educational researchers are beginning to use grounded theory more and more because it makes sense given the types of questions we ask. (p. 218)

As the fieldwork proceeds, continual reassessment and refining of concepts takes place through four primary functions: unitizing, categorizing, filing in patterns, and member checks.

Unitizing. The researcher analyzed data from interviews, observations, and documents in order to reveal information units that contain relevant and applicable meaning relative to the research topic. Each unit represents the smallest piece of information that can be understood by someone with general knowledge of the topic under study. A unit could be as short as a phrase or simple sentence or as long as several paragraphs.

In this study, the transcribed interviews were analyzed for units by using N6, a specialized database software for qualitative data analysis. The software provided archiving of coded units with information about who conducted the interview or observation (i.e., always the researcher in this study), the research phase in which the event took place, what type of event (observation or interview), the interview transcription page and location on the page of the coded source, and a wide variety of other information that could be culled from the database. The software facilitated tagging a unit with a comment, searching data for specific words in the document, or jumping to the coding in any given area of text.

Categorizing. The researcher reviewed and analyzed the archived thought units through a modified process based on Glaser and Strauss' (1967) constant comparison method. This modified process allowed the researcher to develop temporary categories and subcategories containing units of like information. This was done preliminarily by using a spreadsheet to organize potential categories from the first four interview transcriptions. The categories of early analysis were then transferred into the specialized software for qualitative data analysis. Using the specialized software, the researcher further refined the definitions for each category and continued adding unitized samples from the 12 interviews as they occurred and as they became available through the word processed transcriptions. This transferal process required converting the word-processed transcription into a "text document" version, which strips it to its essential textual traits so it could be transferred into and read by the specialized software for qualitative data analysis.

Unitizing and categorizing procedures helped the researcher identify the salient topics evolving from participant interviews. The process of categorizing continued throughout the study and required documenting the refining stages of the category scheme. These various stages of refinement were documented in the methodological log. As units of thought were added, the category schemes were reevaluated until the researcher decided the final set of units had internal consistency (Lincoln & Guba, 1985). With this decision the researcher declared the final category outline (See Appendix A for categories).

Filling in patterns. There can be obvious “holes” in research within a category system, especially given the developmental nature of a naturalistic inquiry. Recognizing the holes allowed a researcher to seek new information to clarify issues and concerns. Lincoln and Guba (1985) recommended three strategies to fill in these holes: extension—using known information as a content guide for scrutinizing documents and records; bridging—using several known but disconnected items as points of reference for further inquiry about how items could be connected; and surfacing—speculating on information that seems obviously missing, given the working category system. When information seemed missing, the researcher targeted specific people for interviews, additional situations for observation, and any other appropriate source that could provide missing information. More discussion about the strategies employed to complete missing information may be found in the section, “Phases of Inquiry.”

Member checks. The member checks provided valuable opportunities for the researcher to understand specific thoughts of participants in the research study. During the member check, participants who were interviewed or observed responded to what the

researcher had observed or recorded. Two types of member checks took place within this study: a mini-member check and the grand member or comprehensive member check.

Mini-member checks occurred during the interview process or in any setting in which the researcher asked the participant to verify a thought as interpreted by the researcher. The researcher accomplished this task by asking a straight-forward question about whether the information written or recalled by the researcher seemed correct to the member. This continuous checking process assured the researcher that the interview transcript represented the perspective of the individual being interviewed. The following illustrates an example of a mini-check from an interview (I is inquirer; P is participant):

P: The reason that [law] suit happened was, God, whoever you want as a higher being, wanted me to get out of that making money and going back and developing real estate, and get back to doing what he'd trained me to do. Just to help people.

I: But even a couple of years ago you had that same realization. Because you made that decision back in the 70s, the 60s and 70s to help people.

P: Yeah, yeah.

I: And so, that is a theme in your life. Is that an issue? Helping people?

P: I like it, love it!

By checking with the respondent regarding whether or not helping people represented a theme in the respondent's life, the respondent verified with enthusiasm that he, in fact, loved helping people.

The grand or comprehensive member check (Lincoln & Guba, 1985) constituted a formal process in which the group of participants agreed to meet with the researcher to

provide feedback after the first draft of the case study document was completed. The researcher sent a completed draft of the case study, including chapters 4 and 5, to the participants. The mailing included a cover letter from the researcher and the *Reviewer Comment Form* (See Appendix D for example of Comment Form).

Participants were allowed 13 days to read the draft case study prior to the grand member check. The *Reviewer Comment Form* allowed participants to indicate text in the draft case study they wanted changed, added, deleted, or otherwise modified to better represent their perspectives. The draft sent to participants had been stripped of the codes indicating the category within the specialized software that archived the thought unit's location. This helped the participants focus only on the text without distracting codes.

The grand member check not only tested for “factual and interpretative accuracy but also [provided] evidence of credibility—the trustworthiness criterion analogous to internal validity in conventional studies” (Lincoln & Guba, 1985, p. 374). The participants' comments were audio-recorded during the check, documented in a transcript, and coded into the specialized software. Attendance by the diverse group of participants helped to assure multiple and dynamic perspectives and feedback about the case study document during the grand member check.

Case Study Construction

The case study provided an appropriate report to conclude the continuous reporting and checking processes that characterize a naturalistic inquiry. Of course, as with most qualitative research, the document representing the “final” research outcome may actually best represent a landing on the steps to the next floor.

Lincoln and Guba (1985) offer several points about the case study report (pp. 359-360). According to them, the case study provides the primary vehicle for an emic inquiry (i.e., a reconstruction of the respondents' constructions). This contrasts with positivistic research representing the etic, which creates an outcome built on a priori concepts. In this naturalistic inquiry, the case study built on the reader's tacit knowledge by presenting a "lifelike description" instead of symbolic abstractions of experience. Such thick description (Geertz, 1973) attempts to elicit a reader's vicarious experience. Thick description also provides information necessary for judgments of transferability. A person reading the case study should be able to understand the context in order to make a comparison to a different context with which the person is familiar.

By demonstrating the interplay between the inquirer and respondents, the case study offers the reader an opportunity to probe for internal consistency and trustworthiness. This concept of internal consistency transcends stylistic or factual consistency and allows a reader to test interpretations of "each new item of information [that] provide[s] another point of leverage" (Lincoln & Guba, 1985, p. 358). Because the researcher's perspective added to the multiple perspectives in the case study, exposing the researcher's bias helps the reader with the interpretive process by providing full information and context. Furthermore, the case study "represents an unparalleled means for communicating contextual information that is grounded in the particular setting that was studied" (p. 358).

Any case study report can be very unique in its style. However, all well-written case study reports contain several important and basic components as paraphrased in the following (Lincoln & Guba, 1985, p. 362): (a) an explication of the problem, which, in a

naturalistic inquiry, typically emerges inductively as the research progresses; (b) a thorough description of the context or setting within which the inquiry took place; (c) a description and documentation of the transactions or processes observed in their relevant context; (d) a discussion of the salencies or those items that are important and studied in depth; and (e) outcomes of the inquiry, or “lessons to be learned” from the study. These “lessons” do not represent generalizations but rather working hypotheses relating directly to understanding the particular situation. Parts of the methodological log that help clarify meaning should also be included in the case study or as an appendix to the dissertation. Because a dissertation houses this case study (some case studies are stand-alone documents), the explication of the problem, other outcomes and lessons learned, and explanations about method and process are found in various chapters, but are available to the reader, along with the case study, as part of the dissertation.

Lincoln and Guba (1985) also offered several conventions for a case study in a naturalistic inquiry research project. The researcher attempted to satisfy each of these conventions in this study. According to Lincoln and Guba, the writing should be informal to facilitate seeing the world through the multiple perspectives portrayed in the report. It should be carefully interpretive only in sections for which interpretation is required. This study provides some interpretation at the end of chapter 5 and further analysis in chapter 6.

The first draft of the report should err on the side of over inclusion so that all potentially relevant information remains available for the member check. The writer should scrupulously honor promises of confidentiality and anonymity as well as maintaining an audit trail in order to increase trustworthiness. In this study, the grand

member check allowed participants to comment on confidentiality and anonymity, assuring those traits were maintained through the research path to the final draft. The researcher also employed an auditor with extensive experience to audit the research for trustworthiness. The writer should also have a firm termination date in mind so all participants will understand the extent of their involvement (otherwise research could cascade indefinitely forward). In this study, the researcher covered the timeline and termination date with participants in the initial meeting with participants and met the termination date.

The writing style of the case study was generated from the points of view provided by the 12 participants. The heart of this case study, chapters 4 and 5, like many case studies based on a naturalistic inquiry, used the omniscient narrative—the all-seeing perspective in which the author permeates every character’s mind and expresses his/her thoughts through a third-person writing style. The researcher also used authorial voice through a first-person narrative in some places of the case study to indicate his presence or thoughts. The researcher attempted to comply with a suggestion by Lincoln and Guba (1985) that the case study should also use active voice.

Phases of Inquiry

This naturalistic inquiry proceeded through several phases using the methods and procedures articulated in this chapter. The following discussion provides a general, yet brief, sense of the research flow.

Phase I—Orientation, Overview, Interviews, and Analysis

During the initial stage, the researcher cleared the research through the University of Nebraska Institutional Review Board (IRB) and an IRB at the university in which he is

employed and that houses the lifelong learning institute referenced in the case study, initiated contact with participants, and collected signed consent forms (See Appendix E for example form) in conformance with both universities' IRB requirements. The researcher began the interview process by discussing the research's purpose and reviewing the expected commitment from each participant. The researcher also informed participants during the initial contact about how much of his/her time would be required.

To begin the formal interview the researcher used grand tour questions and then appropriate follow-up questions (See earlier discussion in this chapter about grand tour and mini-grand tour questions.). Respondents provided information about their history focusing on their unique experiences with lifelong learning. The researcher audio-recorded interviews, wrote notes, pursued the interview path, and completed mini-member checks along the way to clarify meaning and assure correct documentation of concepts for each participant.

After the researcher left the Phase I interview site, transcribing of interview recordings and notes took place. Analysis of data, including unitizing and categorizing, revealed temporary categories and exposed areas of concern requiring more information from participants. Based on those areas, the researcher prepared a strategy for Phase II of the research. This strategy included specific new questions, points of clarification for participants, and identification of documents to be collected. The methodological log contains the resulting strategy, called Phase II Protocol.

Phase II—Focused Exploration

Armed with the Phase II Protocol, the researcher conducted targeted probing of participants regarding the emergent issues from Phase I. Instead of asking broad, grand-

tour style questions, the researcher asked for very specific information and attempted to understand details of the new information. As in the previous phase, Phase II interviews included mini-member checks to assure that interview documentation represented the refined perspectives of participants. The researcher conducted unitizing and categorizing of information from Phase II and analyzed outcomes.

By carefully reviewing the resulting categorical outline and analyzing the qualities of the documentation throughout the various units and categories of thought by participants, the researcher created four broad themes. These themes allowed discussion to be developed in a case study. In this phase of research, the researcher decided to create profiles of each participant, which became chapter 4, and an in-depth case study, which became chapter 5. The researcher then informed participants of the timing of the grand member check in Phase III and sent these two chapters along with the other materials mentioned under the section labeled “Member Checks” above to participants.

Phase III—Comprehensive Member Check and Final Case Study

The final member check provided an opportunity for participants to engage in the research by reviewing the draft of the case study and meeting together with the researcher to share ideas and suggestions. Consistent with naturalistic inquiry, participants discussed the case study and made suggestions regarding overall credibility, errors of interpretation, errors of fact, any potential breaches of anonymity, and anything else pertinent to the perspectives noted within the report. The case study draft included line numbers for each line on every page so everyone participating in the Phase III check could understand which parts of the report they referred to during discussion.

Most participants wrote comments on the *Reviewer Comment Form*, but some wrote corrections directly on the case study draft. After the group member check, the researcher incorporated all changes and new perspectives into the case study report by using a Case Study Revisions Form (See example in Appendix F). The researcher prepared two copies of the case study report, one with codes from the categorical outline for the auditor (See sample in Appendix G), and one with codes stripped, which exists as chapters 4 and 5 herein.

Evaluation of the Study

Essential standards exist for evaluation of naturalistic inquiry (Lincoln & Guba, 1985). A disciplined inquiry, such as naturalistic inquiry, has commonly been evaluated by what has become known as fourth generation evaluation. The fourth generation evaluation “differs in . . . dramatic ways from the first three generations” which were based on test standards and developed through the Joint Committee on Standards for Educational Evaluation and other standards by the American Evaluation Association (AEA) (Guba & Lincoln, 1989, p. 299).

Guba and Lincoln (1989) characterized the first three generations of evaluation as having to do respectively with measurement (e.g., IQ testing), description (e.g., formative evaluation of programs), and judgment (e.g., merit). The standards developed by AEA in 1986 included wording such as “reliability, validity, generalizability, replicability and cause-effect relations, leaving little doubt about which methods are believed to possess the most power” (Guba & Lincoln, p. 230). Guba and Lincoln clarified that fourth generation evaluation involves co-creations of social reality by all stakeholders. They believed that approaching evaluation of research according to these “scientific standards”

misses the point of naturalistic research, which attempts to include the “myriad [of] human, political, social, cultural and contextual elements that are involved” (1989, p. 8).

Starting in 1992, several revisions of the guiding principles for evaluators have been generated by AEA. The current revisions of the AEA guiding principles were ratified by the membership in July 2004 (American Evaluation Association, 2006). These revisions included the following language: “When planning and reporting evaluations, evaluators should include relevant perspectives and interests of the full range of stakeholders” (American Evaluation Association). This change in language illustrates a change in research evaluation since the earlier standards were designated in 1986. The 2004 AEA guiding principles more closely align with the fourth generation concepts promoted by Guba and Lincoln (1989). Fourth generation concepts remain relevant today and were applied to this study.

Fourth level evaluation does not attempt to illustrate “the way things really are, but instead represents meaningful constructions that individual actors or groups of actors form to make sense of the situations in which they find themselves” (Guba & Lincoln, 1989, p. 8). With fourth level evaluation, constructions of meaning result through a process of negotiation among participants. Because of the stakeholders’ ability to negotiate and affect research results, they become empowered and the resulting research includes multiple and trustworthy perspectives (pp. 50-52).

Two sets of criteria have been proposed to judge the quality of a naturalistic inquiry (Guba & Lincoln, 1994, p. 114). The first, trustworthiness, includes four subcriteria, each paralleling other criteria used in evaluating conventional research. The four subcriteria include credibility paralleling internal validity, transferability paralleling

external validity, dependability paralleling reliability, and confirmability paralleling objectivity (Lincoln & Guba, 1985). Table 2 illustrates the comparison of naturalistic inquiry trustworthiness criteria to conventional evaluation criteria.

The second criteria, authenticity, includes five subcriteria including fairness, ontological authenticity (enlarges personal constructions), educative authenticity (leads to improved understanding of constructions of others), catalytic authenticity (stimulates action), and tactical authenticity (empowers action) (Guba & Lincoln, 1989). These criteria are illustrated in Table 3 and discussed in more detail below.

Trustworthiness

The four criteria in the first area, trustworthiness, were developed “in order to resolve the quality issue for constructivism” and are discussed in detail below (Guba & Lincoln, 1994, p. 114). Because they are based in parallels to conventional research criteria, they have received some negative attention for having roots in positivists’ assumptions. These four criteria were used to evaluate this research as methodological criteria, ensuring the correctness of procedures throughout the study.

Credibility. The credibility criterion parallels internal validity in conventional research, which attempts to deal with isomorphism between findings and an objective reality. In this naturalistic inquiry, isomorphism between the respondents’ realities and the researcher’s reconstructions of those realities replaced the conventions of objective reality. Five techniques, explained below, increased the probability of isomorphic credibility: (a) prolonged engagement, (b) persistent observation, (c) triangulation, (d) peer debriefing, (e) negative case analysis, (f) referential adequacy, and (g) member check (Lincoln & Guba, 1985).

Table 2

Comparison of Naturalistic Inquiry Trustworthiness Criteria to Conventional Research

Naturalistic inquiry	Conventional
Credibility:	Internal validity:
Prolonged engagement	Threats include history (events occurring between testing events);
Persistent observation	maturation (changes within respondents between tests); testing (effects of testing on the scores); instrumentation (changes of calibration, etc); statistical regression (initial extreme scores, then moving toward the mean); differential selection (comparing noncomparable groups); experimental mortality (loss of people from groups); maturation interaction (mistaken something for experimental variable)
Triangulation	
Peer debriefing	
Negative case analysis	
Referential adequacy	
Member checks	
Transferability	External validity
Dependability:	Reliability:
No credibility without dependability	No validity without reliability
Confirmability	Objectivity

Table 3

Authenticity Criteria for Naturalistic Inquiry (No correlation to conventional research)

Fairness	Equal power between researcher and participant. Openness of ideas/constructions
Ontological authenticity	Stakeholder comprehend their own world with more information
Educative authenticity	New understanding by participants about the constructions of others
Catalytic authenticity	The degree to which evaluation process stimulates action
Tactical authenticity	The degree to which participants own new empowerment

Prolonged engagement means investing sufficient time to achieve the research's goals. This researcher engaged each participant to test for misinformation that may have been introduced into the study by either the researcher or participant. By remaining engaged over a period of 3 to 5 months, the researcher built a trusting relationship with participants who then were more comfortable sharing important bits of information because of mutual trust.

Persistent observation assured that the researcher understood the depth of participants' issues. Understanding the most salient issues required sorting out irrelevancies. By continuing to label salient factors and then explore them in detail, the research could determine whether or not factors should be pursued. To assure that persistent observation had been satisfied, the researcher engaged all participants at least three times, and in many cases four or five times, in interviews, phone calls, and other

discussions or observations. The approximate average amount of time the researcher spent with each participant was 4.7 hours through the entire research process.

The use of triangulation, the third mode of increasing probability that findings and interpretations are credible, meant using different information sources to assure contextual validation. Although the interviews in this study provided most of the information, other sources included web sites, participants' written statements, an artist statement, and brochures containing creative writing by a participant. These materials were provided to the auditor, who confirmed triangulation of information and validation of the research contexts.

The process of peer debriefing involved using an impartial peer, a person who had no interest in a specific research outcome, to explore aspects of the inquiry that may have remained implicit only within the researcher's mind. This process exposed the researcher to alternative thoughts and questions by a peer protagonist who played the roles of devil's advocate and advisor. The peer probed meanings, biases, and interpretations in methods, ethics, or logic in the study. The peer also provided feedback for testing working hypotheses that emerged in the researcher's mind. At times, the researcher simply needed a cathartic experience of talking about the research to clear his mind of emotions or feelings that clouded and inhibited potential study results. The methodological log contains a peer review journal that documented the highly valuable peer review sessions.

Negative case analysis may be regarded as the "process of revising hypotheses with hindsight" (Lincoln & Guba, 1985, p. 309). Extreme or outlier cases may not fit working hypotheses, causing either adjustments to the hypothesis or rationale for not including the negative case in the working hypothesis. Whether or not the outlier's

contributions should be included as valid in the hypothesis depends on the reader's opinions, which are based on the researcher's rationale in the case study. This study required some negative analysis regarding the meaning of lifelong learning relative to a definition of lifelong learning based on "enrichment learning." Chapter 6 includes discussion about the blurred distinction of the definition, especially according to one participant's thoughts. The participant firmly believes that an instrumental use of learning also qualifies as lifelong learning and practices instrumental learning throughout his actions, even in retirement.

Referential adequacy means that materials and references comprising the data may be scrutinized to determine if they, in fact, represent a benchmark against which later data analysis and interpretations can be tested for adequacy. References could be any source of notes or documents archived for later recall. All data in this research were available for scrutiny by the auditor, who sampled a considerable volume of the data in order to draw a conclusion about the study's trustworthiness.

Member checks provided an opportunity whereby data, analytic categories, interpretations and conclusions are tested with members/participants. Any stakeholder from whom information was originally collected participated in several checks. The researcher received conflicting perspectives about some research aspects and recorded those conflicting perspectives rather than disregarding them. In one instance this meant reversing an element of interpretation in the report. During the first interview, one participant expressed no interest in the dimension of social interaction while participating in a lifelong learning class. In Phase II, when asked again about the value of social interaction, the participant stated that she had never meant that she did not value the

social interaction (despite the fact that she had been recorded on audio tape stating that concept), and that she, in fact, highly valued social interaction. Because a naturalistic inquiry requires the researcher to respect the participant's final word during member checks, the results were recorded as per her last statement and point of view on the matter of social involvement.

Transferability. The establishment of transferability by the naturalistic inquirer differs from establishment of external validity by the conventionalist. Instead of assuring, within a range of statistical confidence, a value for external validity, the inquirer can only create working hypotheses within a rich context. This context allows an interested party to reach a conclusion about feasibility of the transfer of concepts from the case study to any other particular situation. The concepts generated in this study may be scrutinized and judged for feasibility of such transfer to any other context involving lifelong learning.

Dependability and confirmability. These two constructs helped support the researcher's claims of credibility. Dependability is analogous to reliability in positivistic research, and confirmability is analogous to objectivity. This naturalistic study did not concern itself with the reliability of findings and replicability of results. Instead, the adequacy and dependability of appropriate methods in this study should come under scrutiny. The dependability of methods, then, may be based on whether or not they fall within the parameters of generally accepted practice (Schwartz & Halpern, 1988). The generally accepted practices required by the IRBs served as a general frame of reference along with other concepts and practices widely accepted in qualitative research and discussed throughout this dissertation.

Confirmability indicates the degree to which the researcher's conclusions and concepts are grounded in data. An outside auditor assessed this naturalistic inquiry after reviewing the methodological log and wrote a report (See report in Appendix H) and letter of attestation (See letter in Appendix I) about the confirmability of its interpretations and findings. To attest to confirmability, the auditor used the audit plan developed by the auditor in conjunction with the researcher. The audit plan guided the auditor to the raw data from any given statement in the study.

The auditor's qualifications included holding a doctorate; familiarity with qualitative research, and specifically naturalistic inquiry research; familiarity with the specialized software for qualitative data analysis; familiarity with research auditing; and ability to thoroughly assess the research and create a response letter within the timeframe of the study. This highly specialized set of qualifications allowed the auditor to scrutinize raw data, software-processed data and information, and to draw conclusions based on legitimate academic experience (See auditor's bio in Appendix J).

Authenticity

Whereas many aspects of the criteria for trustworthiness spring from positivists' assumptions, the authenticity criteria "spring directly from constructivism's own basic assumptions . . . they could have been invented by someone who had never heard of positivism or its claims for rigor" (Guba & Lincoln, 1989, p. 245). The five authenticity criteria include fairness, ontological authenticity, educational authenticity, catalytic authenticity, and tactical authentication. An assessment based on these criteria can be confirmed in cases emerging from a constructivist research project. This study used

authenticity criteria as supportive criteria to the trustworthiness criteria, but the auditor's report was based on the trustworthiness criteria.

Fairness. Fairness refers to the “extent to which different constructions and their underlying value structures are solicited and honored within the evaluation process” (Guba & Lincoln, 1989, p. 245). The researcher seeks out and communicates all constructions and explicates the ways those constructions and their value systems conflict. In this study, fairness required an open negotiation model in which researcher and participants approached negotiation from relatively equal positions of power and with the same information. This resulted in a mutually constructed conclusion based on participants' viewpoints.

Ontological authenticity. When fulfilled, this criterion provides stakeholders a vicarious experience that helps them comprehend their own worlds in more informed and sophisticated ways. The case study's thick description and insights helped all participants understand the multiple perspectives that contributed to the environment or context in which the study took place. Two techniques demonstrated that ontological authenticity was achieved. Individuals attested to a broader understanding of issues that they failed to understand prior to involvement in the research, and the study's audit trail included entries of individual constructions at different points in the evaluation process (Guba & Lincoln, 1989).

Educative authentication. This criterion represents new understandings by participants about the constructions of others outside of their group. This study did not include a coherent working group, such as a school faculty. Instead, it was comprised of 12 individuals with little or no previous connections to each other. Thus, this criterion

required participants to have new understanding about other individuals. Testimony by selected participants attested to the fact that they understood the constructions of those different from themselves. The audit trail contained entries related to the developing understanding of the interactive, constructive process.

Catalytic authentication. This criterion indicates the extent to which the evaluation process stimulates action. Guba and Lincoln (1989) believed that “no fourth generation evaluation is complete without action being prompted on the part of participants” (p. 249). Because this research constructed meanings in conjunction with all stakeholders, they “own” the resulting action. In this study, documented testimony from participants assured actions of stakeholders.

Tactical authentication. This criterion refers to the degree to which participants are empowered to act. The first step in empowerment, according to Guba and Lincoln (1989), involves providing stakeholders the opportunity to contribute to the evaluation process and research strategies. The researcher must assure that this process occurs throughout the study so participants are fully empowered to act at the consummation of the negotiation process. When stakeholders feel they have had a significant role in the research process and have gained new insights about themselves and others, they experience empowerment. As with the other criterion, participant testimony in this study indicated they did experience new empowerment through the process of participation. Their final act in the negotiation process included several hours of involvement in the grand member check. During this time participants acted through their personal empowerment by critiquing the perspectives within the case study report to assure that the perspectives represented their thoughts.

Chapter 4—Participant Profiles

The participant profiles inform the case study in chapter 5 in the same way a printed cast of characters helps an audience understand characters and story line in a play. The profiles should be considered part of the case study because of the relationship between them and the case study's "story." The following 12 profiles provide basic background information and characterizations of each individual. The profiles use pseudonyms to maintain confidentiality.

Notes about style: In places the participants refer to authors or book titles. These references are not documented by citations in typical academic style because they are simply part of a story. The profiles and case study attempt to quote participants accurately rather than guide readers to a particular document, page, or year of a book.

The interview quotations are written in present tense in the profiles and the case study in chapter 5. Using present tense helps distinguish interview comments from historical recollections by participants, which are written in past tense. Also, using present tense helps indicate participants' current thoughts and feelings about life.

Chester Burnett

Chester Burnett spent his youth in a small Kansas town wondering about the world beyond the city limits. He hitched a ride to New Mexico as a teenager out of curiosity about the American Southwest, joined the Army in WWII, fought in the Battle of the Bulge, returned home, and engaged in business. By the 1970s, he owned a bill collection agency with offices in five regional cities and employed 50 people. He also owned a salvage yard and a garage. He became a real estate broker after a tornado ravaged his home community, knowing that new homes would be built and sold. At the

age of 45, this entrepreneur sold most of his businesses and began an academic career at a major university. At age 51, he had attained a master's degree and began a 28 year career in social work.

Now a youthful 85-year-old, his prodigious reading habits support his interests in Native American culture, alternative fuels, and financial security. He has started men's groups and regularly meets with local artists and intellectuals to discuss mutually interesting topics. Chester contemplates his family's history and his religious background in the Methodist Church. His internal spiritual voice and breadth of knowledge help him make decisions at significant times in his life. Chester sees himself as an inquisitive person who will be perpetually involved in active learning through literature, travel, engaged discussion, and helping others to learn.

John Hurt

John Hurt thinks before he speaks, but you can be sure he has something to say regardless of topic, even if he chooses to listen instead of speaking. Undoubtedly, this thoughtful approach has helped him grow a unique retail business through face-to-face and online sales. The business reflects his unique signature throughout the store and within his marketing materials. The store includes playful murals of dinosaurs and a large-scale reproduction of a painting by famed regionalist artist John Stewart Curry. John's brochures advertising foot apparel feature his essays purely for customers' entertainment. However, when customers read the essay throughout the brochure's pages, they may spot something to purchase.

It does not take long to realize this 54-year-old-man with a bachelor's degree in history takes work seriously but also has a lot of fun expanding the business. In fact, John

explains he does not distinguish between “workaholic” habits relating to fun or work activities. His obsession for work, play, history, and art could be considered a defining trait. He integrates all of his interests into his “work so that work and fun and play are all one in the same.”

Bess Tucker

It was the sparkle in Bess Tucker’s eyes that caught my attention as I ushered people onto a bus bound for a lifelong learning class about the portrayal of Kansas in western films. It seemed to me this 77-year-old, white female had it all together. She was well-dressed, friendly, and smart. I learned later she graduated early from a Texas high school at age 16 and had earned a university degree in home economics when she was “just barely 20.”

When I ask about her degree in home economics, she smiles and replies that she must be “the world’s worst home economist.” Her confidence and maturity allow her to make such self-deprecating, humorous remarks. During her career, she worked as a secretary and bookkeeper, and she became the vice president of finance and administration at an advertising agency. To stay healthy and maintain flexibility, she participates in a senior strength training class several days per week.

Now, living alone after the death of her second husband, she enjoys the freedom to be herself and determine her destiny. She reads and naps when she wants and listens to books on tape while walking her dog. Although Bess enjoys her private life, she also values the social aspect of lifelong education and “being in a community of people who are learning.” Attending lifelong learning classes gets her out of the house and doing something she enjoys—learning—rather than becoming a “couch potato.”

Alex Miller

Alex Miller does not think of himself as a self-conscious learner. However, he has learned much about business through bicycle store ownership and about woodworking through workshops, learning from a mentor, and reading specialty publications. Whatever interest he embarks upon, he tackles it with all his might. He strove to know everything about his bicycle shop and became a widely acknowledged expert in bicycles and entrepreneurship. His success allowed him to sell his business at age 44 and pursue woodworking, development of his home on 80 acres, and maintenance of real estate investments.

At 55, Alex considers himself very lucky because he is self-directed most days. He maintains a simple life philosophy by saying when a door to opportunity opens, he walks through. However, one door that has not opened for Alex is the door to effective reading abilities. He experiences extreme difficulty understanding text-based instruction. Although he attended college, he did not complete a degree. Perhaps he has compensated for his reading problem by learning through doing and by watching others who have advanced skill sets. However you measure it, Alex has accomplished an impressive lifelong learning history, and his story represents a unique life of passion and accomplishment.

Mac Morganfield

The hometown newspaper recently featured a lengthy article about Mac Morganfield for designing and building an ultra energy-efficient house. Designing and building homes represent only two of Mac's interests. His other interests include serious

gardening, recycling, teaching pedagogy, and balancing academic studies and physical work.

Mac starts his day reading newspapers and listening to National Public Radio. He then plans construction projects, reads magazine articles, and meets with environmental groups or other community committees. In the evenings, he takes courses at a lifelong learning institute or attends lectures or concerts.

When Mac passionately discusses teaching and learning, you believe a revolution in education could occur. He believes everyone learns in different ways, and any environment can provide learning experiences through modeling, teaching by example, or conversation. His educational concepts have not been formulated without consideration. He engages others through discussing his classroom teaching experiences or Ivan Illich's concepts, the latter which sought to deconstruct the institutional education system.

Mac shares a deep concern that people today are making bad decisions about the Earth's future. With undergraduate training in environmental biology, he focuses on environmental issues but also emphasizes the interrelatedness of all things in the natural world and within human cultures. He notes, apologizing for the grandiose nature of his comment, that if we lose, destroy, or severely alter a culture, it affects everybody. Mac finds hope by connecting with others who attempt to learn new things. To him, the act of learning represents hope and provides a natural place to begin renewing our world.

James and Mary Reed

James Reed teaches in the school of architecture at a major university. Mary Reed, James's wife, retired from university administrative work and pursues her career as an artist. Both successful artists are 65 years of age. They consider themselves introverts,

although Mary seems more introverted than James. When the Reeds granted an interview and I arrived at their private studio, I felt honored to be in their creative space. Even though they are introverts, they made me feel at home and freely shared their thoughts about learning and their artistic history.

After receiving a master's degree, James began his career by taking a university job as an assistant professor of architecture. He notes there may have been an Affirmative Action dimension to his hiring, because he is an African American. He worked diligently for 5 years to earn tenure, while limiting the pursuit of his passion for freehand drawing and painting. In 1979, he helped create a drawing group so he could continue refining his artistic abilities. The group still meets on Saturdays, 27 years later. He has provided studio space since 2001 in his second-floor studio. He also provides the models, music, and other resources for the group.

Mary creates art in her first-floor studio. She participates more in formal lifelong learning than James and regularly takes classes at the Osher Lifelong Learning Institute. Their lifelong learning interests merge when they attend dance performances and special lectures. They vigorously pursue photography and travel to museums (where Mary feels comfortable and free) throughout the region to observe and photograph interesting architecture. Mary describes James as a leader of those who seek learning experiences and a facilitator of the drawing group. James explains how Mary's art has evolved over the years but has remained consistent through use of complex imagery and quilt-like qualities in a variety of artistic media.

This lifelong learning couple supports each other's learning interests while also demanding independence from each other to remain expressive. Their racial differences

(Mary is white) and their 30-year relationship, in addition to their distinctive lifelong learning approach through the arts, make them unique participants.

Ethel Waters

Ethel Waters, now 80 years of age, realizes her English upbringing helped her embrace the spirit of exploration. Her family's legacy includes foreign travel and lifelong learning. Her father spent time as a boy in South Africa and her cousins have visited Canada and the United States.

Despite her first 30 years in Britain, Ethel claims Kansas as her home, having lived here since 1957. Ethel proudly states she knows a fair amount about Kansas. In fact, she knows a lot about many things because her reference librarian career required recalling countless facts. Known as a "go to" person, she worries a little that people see her as an intellectual snob or a "show off." Although I see her as a very friendly and approachable person, her British accent may reinforce that perception for some Kansans.

Ethel regularly attends lifelong learning classes to remain an active learner in retirement and especially enjoys local history, literature, and religion. She is satisfied with her learning experiences, in general, and she regularly tests her memory and keeps her mind agile through learning.

Liz Douglas

Liz Douglas seems to be on the verge of a dynamic change in her life. She believes it is necessary to embark on a journey through the deeper aspects of "life and emotion and spirituality" to make changes and know oneself. Change to her represents a Zen-like irony. She will tell you "we all start out very simple and basic, and that we try to find answers and look deeper and understand more about life and emotion and spirituality

when, really, we probably had it all in the very beginning. It was very simple and very basic.” Thus, Liz fulfills her quest to find understanding through the recognition that she, like all people, has come full circle in the end.

The journey, during her 51 years of life, has included raising four children, practicing as an occupational therapist, studying yoga, learning to paint, taking lifelong learning classes, and reading anytime, anywhere. When reflecting on her life, Liz explains her first child was born when she was 22 years old. She worked mostly part-time as an occupational therapist while raising her children so she could stay engaged with her professional career.

A relentless learner, she feels “better just going to a bookstore,” She also feels more in touch with the world by providing a “just interpretation” of events for herself rather than relying on media or secondary sources. I think it must be the artist within her that demands she “rock the boat and find out ... what else there is.” Liz’s self-determination helps define her, yet she readily shares her ideas and encourages others to learn with her.

Beulah Thomas

Beulah Thomas discovered, while seeking her social work administration graduate degree after turning 40, that she really enjoyed “going into the [library] stacks and picking a topic and just reading.” Now 62, she maintains her avid reading habit. Recently, she became interested in a painting by Johannes Vermeer entitled *Girl with a Pearl Earring*, located all of the “pertinent books” at the library, and read each one.

She maintains her career in social work administration part-time through employment at an agency on aging, attends lifelong learning classes, takes part in the

docent program at an art museum, and participates in three learning groups, one formed in the 1860s. Beulah maintains this demanding learning schedule, at least in part, because she has been inspired in life by other learners. While working over a period of 20 years at a living community for older people, she learned that those who “stay most interested and engaged in their environment are the ones who had a curiosity that they pursued or acted on.” She saw these people as happier than those less well-adjusted or self-consumed (a “very limited topic” as humorously noted by Beulah). She noticed active learners participated in book study groups, taught classes, quilted, and even had classrooms named after them.

She appreciates the social aspect of learning and expresses her desire to find other learners in her city whom she can invite to go with her to learning activities. Although she has lived for more than 20 years in her hometown, she has not found a special friend like one in Kentucky who shares Beulah’s passion for learning and who will venture to a city, meet Beulah, and enjoy art and learning. Because of difficulty finding friends with equally intense learning interests, Beulah finds it easier at times to simply go alone.

Gertrude Rainey

Thirty-five years ago Gertrude Rainey participated in a Ford Fellowship program, allowing her to visit many communities in the United States for 1 year. This took place in 1971 during the height of racial tensions in the United States. The Ford Foundation chose her along with others whose applications for fellowships demonstrated leadership potential. Gertrude had proven her leadership abilities to the Ford Foundation by founding, along with several women in the community, a preschool for low-income children in about 1965, among many other accomplishments. She accepted the Ford

Fellowship, quit her job at the university, and embarked on a year-long journey including several personal growth workshops that greatly benefited her.

The fellowship may have been the true start of Gertrude's lifelong learning career. Perhaps she started her learning quest because, during her teen years, seeds of discontent about her worldly knowledge were planted in her mind. She and her husband married young, both at age 16, and felt they had little to contribute to any sophisticated conversations. Her hunger for learning led her to a Ford Foundation Fellowship; a public administration master's degree at age 52; a university position, serving as governor's aide; a head position on the Commission on Civil Right, a secretary of aging position at the cabinet level; a state director position for AARP, and a board trustee at a local hospital.

Although these achievements were and are career-based, Gertrude, a 69-year-old-African-American woman, clearly views each one as a learning opportunity and a meaningful way to apply learning. She has participated in pure enrichment workshops, but her focus on community well-being has driven her learning agenda and helped her transcend racial barriers while still advocating for her African-American community. As she tells me her story about lifelong learning, she proudly states a lot has changed since she and her husband married at 16. Now they both offer much—to any conversation.

Sam Samudio

Sam Samudio exudes boundless energy for a man of any age. In his daily activities involving supporting youth who seek employment or education, he moves from cell phone conversations, to committee work in a community service group, to a social agency meeting, to a supervisory job with a student placement from the local university.

His Hispanic roots are always close to his heart and provide him perspective on why he does what he does.

During the 1970s, Sam created a high school career center to inform children of color that career opportunities stem from education. A former school administrator, he hardly seems “retired” according to the traditional concept of the term. Sam’s choice of lifestyle does not include sitting at home all day or gardening. Although he enjoys reading historical novels, he believes integrating learning and positive action help him remain fully involved in the community in areas of education and career advancement for underprivileged youth.

In short, Sam is a “doer.” This integrated approach, including all he has learned and accomplished, provides a seamless environment that equates to a life of learning through action. He prefers learning through community engagement over participating in self-enrichment classes. During a moment of self-reflection, this “first generation Hispanic” marvels at his accomplishments which include the completion of a PhD at age 48. Now 69, he proudly states he has lived long enough to know five Kansas governors on a first-name basis.

Chapter 5-Exploring Twelve Lifelong Learning Perspectives

Beginning Interactions

I drove to the home of Chester Burnett on the evening of May 9, 2006, because he and I had arranged for an interview about his experience with lifelong learning. While planning my dissertation, I had hoped the research would provide opportunities to gain deeper understanding of lifelong learning and reveal the full richness of the participants' learning experiences. I had made the decision to use a naturalistic approach, which requires developing general questions in the first phase of interviews, and allows the participant ample freedom to select and discuss important topics. Now, in front of Mr. Burnett's home and within minutes, I would interview a lifelong learner face-to-face for the first time.

I also felt some concern about the naturalistic interview approach because it involves not knowing where the discussion may lead. This approach does not manipulate variables, offer a set of highly specific research questions, or test a theory. I hoped, as I walked up the sidewalk, this would be the start of an adventure about lifelong learning. I also hoped that through the process of interviewing Chester, I would leave feeling confident my study had begun with traction and would serve a legitimate purpose in the world of academics.

Lifelong learning has been and will be studied by scholars trying to understand general principles and contexts for lifelong learning across its history (Manheimer, 2005). As I began this research, I believed the process of lifelong learning for an individual represented a very personal set of choices that take place far outside the realm of scholarly pursuit. For some lifelong learners, the choice to learn takes place naturally, as

part of everyday life. I was motivated through this research to understand the personal processes and issues in the hearts and minds of lifelong learners. I believed that if we do not understand lifelong learning from the learners' perspectives, we really do not understand lifelong learning in its fullest sense. Knowing we cannot understand the closely kept thoughts about learning in all lifelong learners simply because of the enormity of the task, I chose to learn about those thoughts from a carefully selected group of diverse lifelong learners.

As I glanced through the small window in Mr. Burnett's front door, I could see him sitting in a chair by a large fireplace in what appeared to be his living room, his head tilted slightly back resting on his rocking chair. This image, of him resting in the chair then rising slowly when he heard the door bell, reminded me of the historical image of a Native American tribal chief who had received some type of wisdom and then departed from his meditative state to receive another person.

His warm and friendly greeting did not surprise me, because I had known Chester from his participation in the local Osher Lifelong Learning Institute, which I direct. Through my work as director, I have come to know many lifelong learners. Chester's wisdom, openness, and humor had impressed me. I thought of him first when selecting interviewees.

"Well, hello Marvin, come on in," he said while offering a handshake. A tall 84-year-old man stood before me. With his gentle smile and straight posture, he could have easily passed for his early seventies.

I returned his strong handshake. "How are you, Chester?" I asked as he ushered me through his door and into the front hallway.

We proceeded to his comfortable living room and began the interview process by reading through and signing the confidentiality statements and preparing the audio tape deck. Early in the interview, he informed me of his long-standing interest in Native American culture. I was not surprised, because his walls displayed Southwestern art and because he seemed to possess a soulful connection to the mythology of Native American history. In some accounts of that history, humans were grounded in the land, lived a purposeful and spiritual life, and emerged with the wisdom of preceding ages (Marriott & Rachin, 1968). I could believe Chester was similarly grounded.

While interviewing Chester, our conversation led us through the amazing and unique learning path of his life. From involvement as a soldier at the Battle of the Bulge, to a career as a social worker he started while in his 50s, to his passion for studying culture and religion, we revealed his curiosities, learning activities, roles as a learner, influences, major changes in life, favorite study topics, thoughts about important issues associated with lifelong learning, self-expectations, motivations to learn, and future plans.

As I completed the first of more than 20 interviews supporting my research, I felt satisfied knowing Chester was the initial lifelong learner in this interactive process. He had been informative and forthcoming with his learning story. His interview proved to me that the rich and important ideas of learners over 50 years of age could be deeply explored. He inspired me to continue researching with confidence that an individual's perspective about learning really matters.

This case study shares the perspectives of Chester Burnett and 11 other lifelong learners. Of the 12 participants, nine have attended classes at the Osher Lifelong Learning Institute I direct. Some of those nine attend regularly, and others have only

taken a class or two. Of the nine who have participated in the lifelong learning institute, a few may know or recognize each other, but none are close friends and in most cases do not even know each others' names. One of the nine participants, John Hurt, who attends Osher Institute classes, referred me to another participant, Alex Miller, who has not attended Osher Institute classes. Another participant, Beulah Thomas, recommended a person to me who suggested I interview Gertrude Rainey. Gertrude became a participant in my study.

The 12 participants represent a diverse group with one black man, one Hispanic man, four white men, one black woman, and five white women. Their careers are or have been widely varied, as have their learning interests and learning approaches. Because of this variety in sampling, the naturalistic approach to interviewing, the methods for collecting information and analyzing data, and the purpose of this research—which explores and analyses a specific group of people—results are not intended to have external validity (i.e., the results are not intended to be generally applicable to a larger population). In response to this study, you, the reader, may draw your own conclusions about issues raised and decide whether or not the conclusions and outcomes apply to lifelong learners or to lifelong learning situations with which you are familiar.

Lifelong Learners' Key Categories of Thought

The 12 lifelong learners interviewed in this study provided a flood of information about their learning processes. I became familiar with what mattered most to them. I learned about their histories and future learning desires. I accomplished this by interacting with them during three interview phases, reading their writing, looking at their web sites, observing their paintings, and gathering additional information.

The gradual building of their cumulative learning picture through persistent observations, interviews, and gathering of documents culminated in the development of 16 key categories of thought (See categorical outline in Appendix A). These categories were created through the process of unitizing and categorizing the information in the interview transcriptions (See chapter 3). However, the great diversity of ideas generated by this group of lifelong learners required development of more than 250 subcategories to understand their unique and fertile thoughts (See Appendix A). The 16 key categories included information about participants in the areas of demographics; reading; learning throughout life; integration of life and learning; learning mode or process; types of learning activities, programs, or experiences; role; influences; major life changes; benefits of lifelong learning; communication; expectations; favorite study topics; issues; view of self; and motivation to learn.

Overarching Themes

Beyond the 16 key categories and more than 250 subcategories, other overarching themes emerged from the data. This thematic development is referred to as the third level of analysis in chapter 3. With this analysis, linkages are found among the final 16 key categories. These overarching themes incorporate information from the 16 key categories and represent the most dynamic areas of thought across the group of 12 participants. The overarching themes include: Passionate and obsessive curiosity, significant life events and spiritual awakening, the importance of reading, and uniqueness and variety. These themes are briefly described below and are used in this chapter as central themes for discussion, comparison, and elaboration of participants' thoughts.

Theme 1: Passionate and Obsessive Curiosity

This theme addresses the general curiosity many lifelong learners claim as central to their lives. Ten of the 12 participants described themselves as curious people by nature. Others discussed their passionate and obsessive interests in an area of learning and their motivation to learn based on curiosity and creativity.

Theme 2: Significant Life Events and Spiritual Awakening

The participants freely shared significant events that caused them to think differently or anew about learning. With some, these significant events included a spiritual awakening. Some participants also expressed a need for change in their lives or discussed how a need for a change compelled them to significantly alter their activities.

Theme 3: The Importance of Reading

Each of the participants described her/his reading habits, abilities, and interests. Many participants claimed to be avid or at least moderate readers. Three participants cited problems with reading or the desire to read better. Interestingly, many participants discussed the significance of their father's influence on their reading or learning habits.

Theme 4: Uniqueness and Variety

Little homogeneity exists among participants, even though all 12 individuals discussed ideas that fell within the 16 key categories. For example, each of several participants may have addressed a particular role played in the learning environment or a favorite study topic. These two categories (role and favorite study topics) are 2 of 16 key categories. However, each learner offered a unique approach to integrating learning into life through roles played and choice of study topics.

The 12 participants offered the following variety of responses within the 16 key categories: Twelve types of learning modes; 17 types of learning activities; 18 roles assumed in a learning environment; 19 significant issues related to lifelong learning; 11 benefits of lifelong learning; and 16 learning motivations. The 16 key categories and over 250 sub-categories represent a wide variety of approaches to learning or the unique learning styles among participants.

Of the four overarching themes, three focus on similarities among participants. These include passionate and obsessive curiosity, significant life events and spiritual awakening, and the importance of reading. Many participants identified with the central dimensions of each theme or experienced events that are the foci of the themes. The fourth theme, uniqueness and variety, mostly illustrates differences between participants in their approach to learning. This theme uses information about activities, roles, influences, benefits, expectations, favorite topics, issues, self-views, thinking processes, and motivations related to participant learning.

The rest of this chapter, which represents the heart of this case study, provides the stories, ideas, and histories offered by participants, primarily during interviews. The stories also relate to the overarching themes. These stories, ideas, and histories are compared and contrasted to provide an in-depth look into the minds of 12 lifelong learners. The case study uses thick description (Geertz, 1973) to help the reader gain sufficient knowledge and to compare the story to his/her own experience. If the study accomplishes the investigator's goals, the reader will build on his/her tacit knowledge via vicarious experience by reading the holistic and lifelike description that follows (Lincoln & Guba, 1985).

Passionate and Obsessive Curiosity

Many participants note an organic sense of curiosity in their lives. Ethel Waters, the former reference librarian, knows she has always been a lifelong learner. When asked what it's like being a lifelong learner, she replies, "That's a hard one to answer because, having always been a lifelong learner, I'm not quite sure how to describe it! It comes naturally to me, because I have a wide range of interests and a natural curiosity."

Other learners' thoughts about natural curiosity parallel Ethel's. Chester Burnett notes curiosity "is just second nature to me." When a teenager, Chester ran away from home more than once because he "wanted to see what was out there." He had "been away from home before . . . run away and . . . hitch-hiked, [and] rode the freight trains down . . . to Arizona for a couple of summers. [He even] worked in the creamery down in Phoenix." He's always "wanted to see what was on the other side of the hill."

Chester's curiosity affected his family. His mother asked him once, "What drives you? What makes you do that?" His mother even became "furious" with him because of his persistent questioning. In response, young Chester expressed his curiosity for the unknown, "I just want to see what's out there!"

Another participant's mother became frustrated with the volume of questions her son asked many years ago. Sam Samudio, an education specialist, now 69, chuckles sentimentally while remembering his mother saying, "Would you just shut up?" Liz Douglas, an artist who also studies yoga, notes life can be a circular journey. The circle in Sam's life led him back to thoughts about his childhood through a relationship with his grandchild. Sam's grandson "never quits asking questions." His grandson's curiosity reminds Sam of his inquisitiveness, especially when he hears his daughter exclaiming to

her son, “Would you quit asking?” Evidently, in Sam’s family the phrase, “like grandfather, like grandson,” applies.

Sam offers other examples of curiosity during early childhood. He remembers “being the first kid at school in the morning.” He would arrive at school before the teacher or any of the other students and wait on the steps for school to start. This memory reinforces his belief that he has always been curious. He now sees the same thing in his adult children, “a never-ending desire to know and learn new things and experiment with new ideas and try new experiences.”

When asked if she is curious, Beulah Thomas, who uses understatement when discussing her accomplishments and actions, replies she “would like to think so.” She also reflects back on her curiosity during childhood. Her strategy to complete her childhood chemistry class included a creative solution. She satisfied her curiosity for literature by reading *The Old Man and the Sea* while the “guys worked up the answers to the chemistry take home stuff so [she] could pass the quiz” and then copied their answers. She remains an avid reader today and often pursues topics by reading several books on a topic.

Mac Morganfield, a “green builder,” believes curiosity “would be one of the earmarks of [his] personality.” He states, “I’ve always been curious and I’ve always thoroughly enjoyed learning. And so it would seem almost unnatural not to [be curious]. If I come across something that sounds interesting, often I pursue it.”

Mac expounds on the intrinsic quality of curiosity in his life, “I am often aware of some sort of baseline or innate curiosity. I like to know [how] something works or how things are builtYea, I’m just one of those guys you see walking down the street and

[if I] see something I don't understand I'll stop and look at it. I just explore it. I . . . want to see the small world and the big world." Perhaps this inherent curiosity causes Mac to build highly energy-efficient homes using experimental designs such as foam and cement sandwiched walls pre-prepared with plumbing and wiring that help to provide a gain of 75% efficiency in heating and cooling.

Bess Tucker's curiosity helps keep her mind functioning. Her curiosity compels her to "spend 2 hours reading the [local newspaper] in the morning," and she reads "every article there is." She uses several methods to satisfy curiosity and discover what she does not know. She talks to friends and acquaintances and notes, "these days, of course, [with] the computer, there's lots of ways to find . . . [information]."

Like Bess, Liz simply takes the "time to learn about things that [she has] been curious about but otherwise wouldn't have the opportunity to know about." Liz, 51, expresses amazement in lifelong learners she has met in classes who may be 30 years older than she, and who seek to know "everything they can about every topic." Though there's "very little" about which she would not be interested in learning, she particularly enjoys painting classes, especially when she becomes "totally immersed" in the painting process. Her eyes brighten as she discusses her desired outcome from painting:

When I look up at the clock and I've lost an hour or an hour-and-a-half and I don't know where it went, I feel like I've really gotten a lot out of it then, and I always leave feeling like if I do nothing else today, I've had a good day.

For some lifelong learners, engagement in learning transcends basic curiosity and becomes an obsession. John Hurt, a 54-year-old store owner, reads "whatever [he is] obsessed on at the moment." Recently he read six books on Mt. Rushmore, and seven-to-

eight Willa Cather novels. After reading Cather's novels, he read other biographies and criticisms about her. This obsession lasted over a period of several years. Because of his obsession, he has "read many, many biographies of business people." Reading biographies provides him with greater understanding of what drives somebody to be successful and creates a path to success for him.

The interior of John's store reflects his imagination and features a waterfall and artistic murals of dinosaurs. He often integrates the intellectual, historical, or artistic materials on which he obsesses into his business environment. He mentions, "For a time period, I was obsessed with dinosaurs and read . . . 10 or 12 books on dinosaurs. It made its way to the catalog [and] onto the walls and so, all kind of integrated into the work, life, whatever."

John further explains how he integrates obsessive interests into his career and life, "Whatever I obsess on usually winds up making it into my catalog." He plans to travel to Chappell, Nebraska to view the artwork of Aaron Pyle, one of Thomas Hart Benton's students. John owns two of Pyle's paintings and looks forward to seeing a display of 17 paintings by Pyle in the Chappell Library.

While interviewing John, I asked him, as I did all participants, if he knew another lifelong learner whom I should interview. I thought including people unknown to me at the start of the interview process would help provide more diversity than simply relying on people I knew through the Osher Lifelong Learning Institute. John recommended I speak with Alex Miller, a former bike store owner in the community and a friend he admired. When I called Alex, he accepted my request for an interview. During the interview, process he freely shared his ideas about how and why he learns.

Though Alex never used the word “obsession” or “obsess” to describe his learning style during his interview, his stories clearly indicate his intense focus on narrow sets of topics. Alex’s opening remarks in the first interview clarify his passionate interests:

I have recognized in my personality that I have always been a person who had relatively few interests but intensely held ones, and so for me my whole process, regardless of what I’ve been involved with, originally with my bicycle store, and now with furniture making and woodworking or learning about tractors, whatever it is, I don’t think of myself as being a self-conscious learner about those, but I have these interests and I want to know as much about whatever that is that interests me at all times if possible. I think depth and intensity of interest partially defines the type of personality that I am. So I haven’t really thought of myself as a lifelong learner so much as someone who, whatever I am interested in, simply wants to know tons about it and be good at it. I like the sense of competency that comes from being skilled at whatever those interests are.

Alex’s history of taking an interest to an extreme reveals several impassioned stages. In his early adulthood, he became fascinated with bicycles until it was an “all-consuming passion.” After 10 years in the bike store business, he recognized his interests “shifted from the technology and the hardware to learning about how business skills . . . help you in business.” He then focused on increasing 11 employees’ productivity to make time and money work at a maximum level. During his last 7 years as a bike store owner, his store was voted as “one of the 100 best bike stores in America.”

After selling the store, Alex enjoyed more time for self-directed activities. A trade with a local hardware store owner resulted in him acquiring a table saw. He soon recognized he could not produce much with the saw without a complement of other tools. He humorously talks about the slippery slope of learning:

I had the table saw and there's not a damned thing you can do with a table saw. So before you know it I had a jointer, then I had a planer. I had to learn to use all of that stuff. Then I had to learn how to sharpen chisels . . . I learned that there are cool Japanese chisels, and that slope really got steep. You know. So over the edge I went!

Alex's passion for learning, combined with his drive to know all he possibly can about his current area of intense focus, help him succeed. His interest in bikes gave way, after many years, to his intense interest in running a successful store. After selling his store at 44, he became obsessive about woodworking and now sells finely crafted, customized furniture. He eventually moved to an 80 acre country site and helped design and build an impressive house. He spends a great deal of time developing the land by restoring the prairie, planting trees, and building a cabin. With Alex, the words "passion," "intense," and "slippery slope," further reveal his obvious undying interests in, curiosity about, and commitment to learning whatever he has chosen to pursue.

Alex applies his passion for learning to activities involving his land or his woodwork. Two participants, James and Mary Reed, also experience passion for their creative activities as professional artists. James Reed's passionate interests and curiosities have had to wait at times in his life. When offered a position as a new professor of architecture, he "had to put away [his] passion for painting" and become "fully engulfed

in class preparation and learning” about the subject matter he would be teaching at the university. He now satisfies his passion for photography—just one of his artistic talents—by obsessively shooting photos and developing film. In the past, he has kept “20 to 30 rolls of film in the freezer” waiting for processing.

Obsession and compulsion seem to work together for James. After obsessively shooting photographs, he compulsively “saves everything,” despite his tremendous backlog of unprinted photos and incomplete paintings. Similarly, he has been “pretty obsessive about . . . writing different friends” and compulsively saving the written communication so, if he wants, he can return to those communications at a later time.” I believe, after speaking with James, that he carefully archives his unfinished work so someday, when his career as a professor is no longer so demanding, he can return to it with renewed passion.

Mary, James’s wife, has always been creatively active according to James. She pursues learning but expresses frustration that her curiosity about photography cannot be satisfied through the local university. She notes that the enrollment process requires full-time student status. This especially frustrates Mary because professors specializing in photography have key bits of knowledge she needs. I called the university’s Design Department and learned about the complexities involved with class enrollment for nontraditional students and how such complexity causes Mary barriers in gaining access to classes. This helps me understand Mary’s frustration. Together, these two artists do not focus on curiosity in-and-of-itself as much as the creative process of producing art. James clarifies how the learning process works for artists by noting, “The key word is not so much lifelong learning but lifelong creativity.” As artists with a lifelong history of

creative production, learning, curiosity, and creativity flow together to fuel their passionate interests in art.

Gertrude Rainey views curiosity differently than other learners. When asked if she is curious she says, “Yes, I am.” Her patterns of thinking and searching for answers at times has prompted her husband to say, “Turn it off!” She describes her “always on” type of thinking as a “continuous thinking” and describes herself as a “searching thinker.” After we discussed her process of continuous thinking, she proved her curiosity by asking, “I don’t know how I fit in [your study]. Am I a lifetime learner?” Her lengthy history of adult learning starting with her fellowship through the Ford Foundation, her wide assortment of service positions in which she learned about community needs, her attainment of a graduate degree at 52 years of age, and her participation in lifelong learning classes leave little doubt in my mind about her curiosity and lifelong learner status.

Significant Life Events and Spiritual Awakening

Many of the participants experienced life events that affect their thinking and learning today. These significant events range from Beulah’s simple recognition that she has more time to learn because she no longer makes chocolate chip cookies twice a week like she did when her daughter was a child; to a complex battle with real estate that ended in a spiritual awakening for Chester.

International experiences have greatly impacted Mary and Ethel. Mary had started her university career in mathematics when she took a trip to Mexico. During the trip she visited little villages, each having their “own cultural rhythms and skills for handicraft.” Through that experience, she learned “important things of life are people’s perceptions

about life, about things, rather than facts and numbers.” Upon returning to school, she changed her focus from mathematics to anthropology and Spanish, and she became a long-time student focusing on social and environmental themes. Mary continues working with these themes 40 years later in her artwork and with her choices about learning.

Ethel gained a hunger for exploration while growing up in England in the 1930s. She grew up in the mining area of Cornwall. When the mines closed, many Cornish people moved to various parts of the United States, South America, and Mexico, or any other place they could find work in hard rock mining. Her father’s family went to South Africa when their place of employment in England closed. Because of these experiences, Ethel recognizes in her family a “tradition of going out” to distant locations.

As a young woman of 32, Ethel read an advertisement in the *London Times Literary Supplement* about a position at a university library system in Kansas. She responded and learned she would earn more in the United States while also learning about the United States library systems. Her tentative “2-year stay” became almost 50 years of residency in Kansas. Looking back, she exclaims, “I uprooted myself; I am not a refugee!”

Learning represents one continuous line throughout her international experiences and includes adult education classes in England as a teenager, moving to the United States, a career in the library, and church classes. She accepts a description of “inexhaustible explorer” and asks, “Exploration is lifelong learning, isn’t it?” For Ethel there is no doubt that international travel has paralleled and fueled her quest for lifelong learning.

Gertrude also experienced a significant event while in her 30s when she participated in a Ford Foundation Fellowship. The Fellowship provided an opportunity for recipients to travel to many domestic locations and study leadership and community activities through interactive workshops and observations of places such as the Street Academy in Harlem. One of her most profound experiences through the Fellowship was a National Training Laboratories workshop on personal growth in Bethel, Maine. The workshop helped her learn how to interact and talk with a variety of diverse people.

Gertrude emphasizes that the workshop learning experience “benefited [her] greatly” and helped her to become conversant in any situation later in life. Looking back, she explains she and her husband were 16 years old when they married, and they had “nothing to contribute” to conversations because they had not traveled or read. She notes, “I was a very reserved, shy person, so it was very helpful to me to have those experiences.”

The Ford Fellowship was a turning point because it forced her to talk and think about what she wanted other people to know about her. Now, because of her life of learning, she speaks with confidence and knows she and her husband have much to offer their community.

Alex recognizes distinct times in his life when changes required him to learn about new topics. One example involves the activities leading up to the development of his highly regarded bicycle store business. He explains that, at age 22-23, he became infatuated with a girl who rode a bicycle. He started riding a bike so he could connect with her and eventually became intensely interested in bikes, while his interest in the girl

quickly faded. He started a small bike shop in another state and did not think of it “as a lifelong career.” Instead, he notes, “The door opened and I stepped through.”

Alex worked diligently from 1974 to 1994, until his bike store became very successful, allowing him to sell it and become more self-directed. He implies that to leave the bike store he needed some type of event or permission. His new interest in woodworking sent him down a “slippery slope” of learning and provided the “permission slip to get out of the bicycle business.” For Alex, these two significant events, starting a bicycle store business and becoming interested in woodworking, changed his life and helped him progress as a lifelong learner who seeks to be the best at whatever he does.

Three participants, Bess, Mac, and Chester, experienced similar significant events that altered their approach to life and learning. For these individuals, the painful process of divorce provided opportunities for positive change. Bess’s divorce in the 1970s caused her to reevaluate her job and restructure family involvement. These changes may have been predictable, given the divorce. However, she might not have predicted she would become competent in the use of computers and remarry. In that marriage, she increased her reading habits, enrolled in lifelong learning institute classes, and began listening to books on tapes while walking her dog after her second husband became unable to walk with her. The divorce shifted her focus toward more control over her time and learning interests.

Mac found himself in a “topsy-turvy” world in which he “had to rediscover who [he] was” after divorce. He discovered his new identity because he was “no longer a full-time parent [or] . . . a full-time partner.” In 2000, at the age of 47, Mac decided to consult with a graduate advisor in journalism at the university about returning to school. He

recognized starting a new career would require a sizeable investment and could result in earning less income. When I ask Mac about pursuing education more for enrichment rather than as a career pursuit, he notes he “really hadn’t even thought about that,” but that maybe he’d “have to think about that.”

Mac perceives a need for change as he starts the “last half” of life.” He desires to reduce the amount of physical work and increase his intellectual involvement and interaction with people. The physical activity of building has “taken an ever increasing toll.” Mac thinks about possibilities for a learning environment that would satisfy his need for intellectual stimulation and speculates about models “out there” that offer academic education and physical world projects.

John believes his equilibrium could improve by allowing more time for learning interests. James also desires more time to practice his artistry rather than focus on work as a architecture professor. He emphasizes his concern, “I’ll never catch up . . . I’ve got such a back log of work that’s never been realized.”

Chester identifies numerous significant life events. After a childhood of being the “shyest person you ever saw . . . growing up.” He recognizes a “turn around” in his life after taking a Dale Carnegie course in 1967 and feeling like “bubbling over” with excitement about becoming a leader. Another significant event for Chester occurred a year earlier when he enrolled in college in 1966 and paid for school with retirement money against the recommendations of friends. He ultimately earned a social work master’s degree in 1972, at age 51, and continued experiencing change.

Chester’s experience during World War II included fighting the Battle of the Bulge and other European battles on the Rhine River and in Holland. He saw good

friends killed during those battles, and consequently suffered from memories of death that haunted him after returning to the United States. In 1976, armed with a master's degree, he decided he "needed to deal with this issue [of death]."

He took a job on a renal dialysis unit at the hospital and often counseled people who were experiencing the process of dying. He also counseled family members of the dying person. Through such work he began leading hospital workshops about family concerns following a family member's death. He also read books by Elizabeth Kubler Ross about how to cope with death and dying. This series of events was highly significant to Chester's social work career and personal growth. He began learning through workshops, reading, and formal academic education about coping with his fear of death and how to help families with this issue.

In 1979, Chester faced hardships when a land development deal backfired and he and some investors fought an expensive court case. They "won the battle but lost the war," because they won the lawsuit but sustained heavy legal fees. This left him emotionally devastated and financially weaker. He became distraught because he had seen his grandfather lose his farm in the 1930s and pledged that would never happen to him.

With his life at a low point, he experienced a divorce in 1982 that shook him "at the foundation." This "mid-life crisis" led Chester to a "spiritual awakening." He notes that, "God, whoever you want as a higher being, wanted me to get out of . . . making money and going back and developing real estate, and get back to doing what he'd trained me to do. Just to help people." Chester continued his commitment to educate others and sustained a private practice for 18 years until 2000. His educational approach

with clients included helping them learn, staying current in his profession, and remaining inspired to make a “difference in people’s lives.”

Sam also experienced a spiritual awakening that influenced him towards a life of learning. As he was climbing the ladder in educational administration, he recognized as an assistant principal he could “make people do this and make people do that.” He could “negotiate contracts, and . . . write all kinds of stuff.” Then something “came down hard” on him, and he realized the problem was not his alone. He notes, “I’m not by myself,” and explains:

If you want to put a thread through my life, that [commitment to God] probably is the most consistent thread. When I was a kid I used to serve mass, the priests would sometimes rely on me to put everything together and on church nights, Wednesday nights, if they couldn’t be there I’d lead the people in prayer, and so read them from the book you know . . . And I guess that probably gave me the first taste of being in front of people and doing things.

Sam followed his early spiritual commitment by assisting a chaplain during 4 years in the air force. While in that role, he met officers and others who had completed college. He “learned very quickly that [he had] as much going on as they did.” This was a revelation to Sam, because his experience as a youth included being disregarded for being a Mexican-American. Sam notes many people in the community thought “Mexicans were OK but they’re not white.” He explains:

My background came from a family whose education was not their top priority. And schools at that time, although they were not discriminatory to me . . . certainly did not say . . . I was on the school honor roll. Nobody ever said to me, “You ought

to go to college. You know you ought to do this.” So it was kind of benign neglect, is what I label it.

After getting to know officers and recognizing his capabilities, he “decided at that point” to continue seeking education. He soon completed a bachelor’s degree and began his career in education.

Another significant event for Sam occurred during the turbulent times of the early 1970s when he created a career center in the high school where he worked as a counselor. That creative act was “probably the genesis of [his] breaking away” and becoming successful in education. He became a junior high principal and never looked back. He continued his education and received his master’s and doctorate degrees while pursuing his career.

Sam will tell you that “religion has always been a thread common to everything” he does. When asked about his commitment to religion and how it relates to his involvement in lifelong learning he notes, “It provides me a purpose for the learning.”

Mary also relies on spiritual enlightenment to guide her towards her ideal of being an informed and intelligent learner. Her primary mentor in life, a Jewish man with “unlimited intelligence,” has guided her through emotional and spiritual issues. After her mentor moved several hundred miles away, she and James traveled to meet with him. Mary appreciates most that her mentor “is . . . not just smart, but he’s good.” She believes “the way he is as a person, at his core . . . is a very moral person.” Even though Mary has not maintained frequent or recent contact with her mentor, he remains a major influence—a “fatherly” influence—on her.

Liz believes learning relates to her spiritual nature. Through the process of learning, Liz hopes to “understand why people do the things they do, and [to] let everybody be who they are without judging each other.” She apologizes for sounding trite when discussing how she tries “to understand the real meaning of life” by participating in lifelong learning. To her, the basic humanistic aspects of being involved with lifelong learning classes are important:

I think I enjoy what other people have to say in the classes, just because they are sharing their life. And . . . none of us ever know what anybody else is dealing with or where they have come from, or just how their experiences have shaped them . . . you find out that we’re all very different and yet we are not really that different at all.

She relies on her spirituality to help her understand more about herself even though participating in that process can be “painful.” She notes, “It’s interesting for me to see other people in the [lifelong learning] classes and see . . . what their life has been and how they’ve dealt with it.”

This section illustrates how participants recognize the effects of significant events and spiritual influence on their learning activities and abilities. They also recognize the significance of reading on their learning processes and enthusiastically address reading throughout the interviews. The next section focuses on the importance of reading to participants.

The Importance of Reading

It should not be surprising that people who prioritize involvement with lifelong learning are also enthusiastic about reading. Most participants express such zeal;

however, three participants must cope with poor reading skills and hope to improve their reading abilities. The participants volunteered information about reading books, magazines, and newspapers, including how much, where, and why they read.

John Hurt's impressive reading habit serves as the focus of his lifelong learning strategy. He spends most mornings from 10 to 11 reading the literature over which he is currently "obsessing." Recently he read "about" six books on Mount Rushmore and seven or eight Willa Cather novels. He was not satisfied to stop with Cather's books, but continued, over a period of several years, exploring Cather's work through other biographies and criticisms of her writing. His obsessive interests often influence his store's promotional materials. One promotional brochure featured his essay about Cather. The essay enticed the reader to look throughout the entire brochure to finish the essay.

John's reading habits come honestly to him because his "father was an active reader" who "probably read 3 hours a day." John doubts he reads as much as his father but imagines "that through his example . . . it seemed like the normal thing to do." Liz, who reads "every day" also experienced her father's influence upon reading. She explains:

My dad read every thing he could get his hands on . . . I would try to bring him things from trips I went on. And then I really realized the nicest thing I could bring him were newspapers from wherever I had been, because he was very intelligent. He just . . . read and wrote all of the time.

Liz maintains an active life but attempts to read whenever and wherever she can find a spare "nugget of time." When her children were little, she would arrive early by 10 or 15 minutes to pick them up so she "could sit in the car and read." She also enjoys

reading outside and remembers reading books in the park during high school. Liz enjoys reading fiction such as *One Hundred Years of Solitude* by Gabriel García Márquez, self-help books like *The Dance of Anger* by Harriet Lerner, and literature that feeds her soul such as *Awakening the Buddha Within, Tibetan Wisdom for the Western World* by Lama Surya Das, recommended by her son.

Like Liz, Beulah also finds certain reading locations inspire her. While seeking her graduate degree in social work administration, she really enjoyed “going into the [library] stacks and picking a topic and just reading.” She acknowledges that now “you can do that online, but it’s not quite the same to [her] as sitting in that [library], just pursuing the topic. Beulah, who always reads more than one book at a time, started reading mysteries when she turned 50. Now 62, she believes “it’s detective stories” women her age enjoy by Dorothy Sayers and Ian Rankin. She believes peer status among a group of women encourages sharing of books and interests in literature and notes she and her friends are “swapping books all the time.”

Chester’s unquenchable thirst for reading drives him to spend “at least one day a week at the library reading the *Wall Street Journal*, *Value Line Investments*, magazines, and newspapers, the [daily paper from where he lived much of his adult life], the *Kansas City Star*, and *Business Week*.” Chester assigns himself more reading than he can complete. He explains, “At my bed I’ve got four books that I’m part way through.” Aside from his interests in finances and current events, he likes to focus on the cultural dimension of lifelong learning. He has engaged in “a tremendous amount of reading and studying of different religions. And thinking about spirituality and all of the different kinds of religions there are in the world.” His “half a library downstairs on Native

American books” serves as evidence of his long-standing interest in pre-European-American culture in North America. Chester reads extensively about environmental issues including literature on alternative fuels and energy efficiency in home building.

Like Chester, Mac focuses much attention on energy-efficient homes, and his reading practices are similar to those of Chester. When he rises in the morning, he listens simultaneously to NPR and “peruse[s]” the local newspaper while eating breakfast. He reads “a dozen magazines” including *The Progressive*, *National Geographic*, *Harper’s*, *Mother Jones*, and others. He sometimes reads *The Christian Science Monitor*, but notes he is “saddened that it’s not nearly the newspaper it used to be,” and believes the change in quality has occurred because of society’s lack of support.

In contrast to Chester’s and Mac’s craving for reading, three participants, Alex, John, and James, have difficulty reading. Alex and James often find other ways to glean information. Alex has developed a learning style based primarily on visual instruction. He often watches other woodworkers and people with specific skills he desires, then uses ideas he has observed by making them his own. He explains:

I wish that I learned more readily by reading, that I was a better reader. I think that . . . life is a diminishing resource and as I get older and have less ability to physically see well if I am observing . . . if I try to learn new skills or just looking for ways to be entertained going forward, certainly reading would be a skill that it would behoove me to get better at. As you age . . . [reading] is for most people more acceptable rather than the hands-on style that I have developed up to this point in life.

Throughout Alex's life, reading has required spending much time with texts. He describes reading in college as "unbelievably grueling" and requiring a "massive commitment" due to underlining, outlining the book, outlining the outlines, outlining the outlines of lecture notes, and speaking notes out loud "in order to retain any portion of it." Alex wonders if "the root of [his] issue with reading" might be a "physiological one with some sort of dyslexic [problem]." John also wonders if he may be dyslexic but has read volumes of books despite this concern.

James, like Alex, wonders if his problems with reading may have to do with some type of reading deficiency. He can manage the process of sitting and reading "for so long, then [he has] to stand up and move around, or change what [he is] doing." He relies on using other forms of media including visual and aural media to quickly grasp the information he needs to stay professionally current. To reap the fullest benefit from reading he must "read every word and . . . digest it all." Reading simply "didn't take" for James, yet he has excelled in an academic environment at a major university.

Mary considers herself a moderate reader and stays focused on art books—borrowing professional books from James's library at times—and magazines, newsletters, and books on physical health. She applies what she has learned from these sources and other reading materials on alternative medicines to help James and her with health issues.

Ethel enjoys helping other people by reading 6 hours per week at the university's Audio Reader, a radio reader service for people with visual impairments. For her own satisfaction, she reads a "fair amount," but "nothing very serious." Bess also reads for

enjoyment by spending 2 hours per day reading “every article there is” in the local newspaper. She also walks her dog while listening to books on tape.

Bess thoroughly enjoys the freedoms she now experiences as a single person living alone. Like Chester, she often reads more than one book at a time, “one upstairs and one downstairs.” She laughs while explaining she especially likes “to be able to sleep till 7:30 in the morning” if she wishes . . . or “take a nap if [she] want[s] to, and stay up reading” if she so desires. It’s her life and her decisions that count now.

Gertrude also experiences more latitude in retirement than when she worked full time. She has, at times, participated in reading groups at the public library and enjoys reading a variety of literature. She notes she reads moderately and prioritizes her reading around fiction, then history, and then finally politics.

Retirement has also allowed more time for Sam to enjoy reading about leaders in history such as John Adams or historical books by Stephen Ambrose. He recalls reading as a child. He “started out by just reading comic books,” but his father strongly disapproved. As a young teenager, his half-brother—home from the military—ordered *Look* magazine, and Sam began to read the stories. One article on the 1920 election of Woodrow Wilson remains vivid in his mind. He continues reading today and spends his time every Tuesday night reading while his wife meets regularly with her female friends. He regularly reads *Newsweek*, “two to three Catholic newspapers,” and historical novels.

Although few participants know each other, many experience similarities in what reading means to them. It provides them freedom to explore topics in which they are interested. Reading also provides enjoyment and entertainment, and it informs them about new developments in professional areas. However, not all participants can fully

enjoy reading because of the great difficulty some experience while reading. Each participant, regardless of the fluidity with which they read, has adapted his or her learning style, including reading capabilities, to fit his or her unique interests. The next section elaborates on unique learning aspects of each participant and the variety of learning styles among them.

Uniqueness and Variety

The 12 participants offered a flood of information, facts, and interpretations about their learning activities, preferences, and concerns. The highly unique traits and variety of learning approaches shared by participants included their motivation to learn; favorite study topics; types of learning activities; learning process, influences, and benefits; roles; issues; and view of self.

Motivation to Learn

Basic and intense curiosity motivates Chester to continue learning, but his scope and appetite for learning also stem from additional motivators. His curiosity as a child who “wanted to see what was on the other side of the hill” seems intact in this 85-year-old man. He explains he wants to know if Mrs. Yates was “really crazy when she drowned five kids,” and “what drives...people to strap explosives around their waist and blow themselves up.” He continues, “Do they really think . . . they’re going to get up there . . . and get some virgins or something.” Allowing for the unknown he states, “I mean, does that make sense? No, not to me, but maybe to them it does. [T]hese are the . . . things that drive me . . . to find out what drives them.” Aside from the motivation of general curiosity about life, Chester also wants to help other people, especially family members, learn by sharing financial investment information.

When it comes to learning motivation, Sam identifies with his children and grandchildren, and believes “it is the never-ending desire to know and learn new things and experiment with new ideas and try new experiences.” He explains that he has “a grandson who never quits asking questions.” Bess deemphasizes curiosity as a motivator, but instead cites practical reasons for learning. She simply “need[s] to get . . . out of the house.” Bess lives alone and notes, “It would be easy for me to become a real couch potato. And so I might as well go and do something I enjoy, which is learning the things that [the Osher Lifelong Learning Institute] offer[s] and the opportunity to learn.”

Beulah has been inspired by aging people in the living community where she worked who “stay most interested and engaged in their environment.” She believes “they were happier” than others who were self-absorbed. She uses the motivation to remain engaged so she can “orchestrate keeping life interesting” for herself.

Unlike Beulah, Alex does not focus as much on inspiration from others for motivation. He expresses an intrinsic motivation to be recognized by others for his business success and for making money. At another level of concern, his “bleak and negative view of the world,” provides a “big chunk” of motivation to make “something tangible and beautiful and hopefully creative,” such as his customized wood products. His adamant belief that our “planet does not have the natural resources available to support 6 to 10 billion people” leads him to declare, “it is simply the end of the world as we know it.” He compares humankind to dinosaurs, emphasizing his concern, “The dinosaurs were here for 200 million years and every last one of them is gone. Anybody that thinks that humans are going to last too much longer is a[n] . . . idiot.”

Mac discusses his motivation to engage in learning so he can find a “better way” to live than “hustling just to . . . pay the bills.” He sees people “going through the motions and many times working a job they do not like or don’t find satisfying.” He agrees with Alex that “the world is in a pickle” and that “what we’ve been doing, we can’t continue to do.” His academic background in environmental studies helped him become aware of the “limits to growth” and the “limited resources” that humans abuse. He believes “every part [of the world] is connected to every other part, and if we loose or destroy or severely alter [a natural resource, or] some culture, it affects everybody.” Learning for Mac equals “survival” in both literal and social contexts of the term.

James’s motivations stem from his career’s demands to stay current and his passion for creative expression through photography and other art forms. Mary sees “knowledge as power” and is motivated to be an “educated, intelligent creature.” Ethel “would have to say that it is [her] family background” motivating her to learn. Her father, mother, and aunts “encouraged [her] to go to the university.” She states with confidence, “Because I was not good at games, was left-handed, and had no particular beauty or charm, it just seemed like a natural thing for me to do, to engage in learning.”

Gertrude was motivated as a teenager to “learn some things to talk about,” and as a young woman who had experienced the Ford Foundation Fellowship, to be socially equipped to discuss issues with other people in the community.” She is motivated to apply learning in a practical way and looks for connections and applications for her investments in learning. John, unlike Gertrude, learns just for fun and because he “derives pleasure” from learning, even though he believes learning “is [also] financially in your best interest.” Liz believes learning helps you “communicate better with other

people,” and seeks motivation through learning to find the interconnectedness between things in “totally unrelated fields.”

Favorite Study Topics

The lifelong learners embrace a wide range of interests and passionately discuss their favorite topics and long-term interests. Ethel enjoys language, literature, and history, “particularly local history both here and back in Britain.” Sam studies history and currently reads books about John Adams and military history. His favorite topics include religious studies focusing on his particular beliefs. Chester also likes military history, especially Civil War history. He sustains a lifelong interest in Native American history and culture and has spent several weeks on reservations pursuing his interest. He manages to do a “tremendous amount of reading and studying in different religions” and spirituality. Chester balances his interests in spirituality by pursuing long-term interests in financial planning and environmental concerns including alternative energy.

John, having a degree in history, enjoys learning about historical figures such as “Thomas Jefferson and Alexander Hamilton because their personal and intellectual differences pretty much define America’s political controversies for the 230 plus years,” For as long as he remembers, he has been interested in history, people, society, and politics. His interests transcend history and politics and include the architecture of Frank Lloyd Wright and the study of historical theatres. Bess enjoys history, but also likes “music and some of the science presentations,” She especially “loved the class on the tsunamis and other major disasters,” but has not enjoyed learning about art. Because of her lack of art education, she is “not sure that the exposure [she is] getting turns her on to it.” Bess’s current interest in politics is greater now than at any other time in her life.

Pursuing her political interests, she has taken group trips to Philadelphia and Washington, DC in the company of a presidential historian/instructor. These experiences help her grapple with the “nitty gritty political questions that we are facing in this world right now.”

James studies art books from his extensive library and pursues his passionate interests in freehand drawing and other painting media. He also claims to be “a little bit of a DJ.” Because of his love for music, he enjoys playing recordings from his “extensive jazz collection” and selections of classical and popular music for members of his drawing group. His history of music appreciation dates back to growing up in Philadelphia, attending jazz clubs, and making bus rides to New York City where he heard “Miles Davis at the 5 Spot” and other jazz venues, including the Village Vanguard.

Mary expresses openness to many workshop topics because she “always learn[s] something [she] didn’t know before.” She does not prefer formally studying music but appreciates religion, art, and politics. James and Mary both enjoy studying architecture and photography, which they have integrated completely into their lives and expressive arts.

Beulah thoroughly enjoys the art world and has increased her knowledge of impressionistic art and other art forms through her docent work for the local art museum. She chose to study contemporary art during the past year because it was the art form she “knew the least about.”

Mac finds a balance between studying the natural world and the human world through cultural studies. His wide range of interests stems in part from his agricultural roots. He demonstrates his interest in land by maintaining a large garden with his two-

cylinder diesel tractor. Though it would be common to see Mac with his hands in the earth tending garden, it is just as common to see him enjoying a concert of Mozart's music or reading *Harper's* magazine. Though he maintains a wide range of interests, he has invested heavily in the topic of energy-efficient building and has translated that work into his livelihood.

Liz also seeks equilibrium in her life and pursues balance by studying yoga to achieve "inner peace and calm." Her broad range of learning interests includes history, spirituality, biographies, and painting. She accomplishes the "deeper looking" to find connections between topics.

Alex's history of learning has included becoming an expert in bicycles and business. However, his interests in bicycles have waned since the 1990s and have been replaced by an interest in fine furniture making. His passion for developing his land has also caused him to start learning about tractors. He mentions, "If I could find a beginner's tractor class, how to do maintenance, I would do it in a heartbeat, cause I know that the only way I'll learn how to do maintenance is by getting it in an environment where people are taking the stuff apart and saying, 'Oh that's what a distributor looks like, and oh, that's the hydraulic pump'."

Types of Learning Activities

Lifelong learners participate in a wide assortment of learning activities, including lifelong learning classes, travel, lectures, workshops, and other events. The communities in which they live are rich with offerings through the Osher Lifelong Learning Institute, Parks and Recreation, the hospitals, the universities and colleges, and

other community organizations. The following discussion includes the categories the learners provided.

Lifelong learning classes. Many participants enroll in lifelong learning classes to formally continue learning. Mac took a writing course recently and now hopes to find a writing group, something that would “hold [his] feet to the fire a little bit.” He appreciates the concepts of interaction found in Fox Fire (i.e., a nonprofit educational and literary organization and interactive community-based approach to learning), and desires to participate in something similar to the Fox Fire approach in community education. He realized during our interview that the Osher Lifelong Learning Institute classes have “a little feel of [Fox Fire].” Beulah thinks the Osher Institute classes complemented her work as a docent at the art museum because she learned about art in both settings. She especially enjoyed an Osher class that toured various art museums.

Ethel had taken lifelong learning classes prior to the implementation of the local Osher Lifelong Learning Institute through Continuing Education at the university and classes at her church. Gertrude has considered taking classes at the Osher Institute but does not want to pay for an entire season or year of classes. Instead, she wants the institute to offer courses a la carte and charge only for those courses.

John participates in lifelong learning classes but notes that “Osher learning classes were kind of an aberration for me.” He explains how the Osher experience was unique, “I mean here at work I am the oldest, it is my norm. To go to the Osher classes is a little odd in that respect. Not bad! But different.” The Osher Institute focuses on people 50 and over with an average student age of about 64 (University of Kansas, Continuing Education, 2006).

Liz enjoys the casual aspect of Osher Institute classes, “That’s important to me right now. And I think that’s the real beauty about the Osher classes. If it doesn’t work out, it’s not the end of the world.” She also likes not “working for a grade.” Bess expresses appreciation for the Osher classes, “Yes, I’m happy. I don’t know what I’d be doing [regarding lifelong learning] if you weren’t offering what you are offering.”

Beulah has participated in Osher classes, which typically last “two-three-four nights over two-three-four weeks” and other 10-week lifelong learning classes elsewhere. She was “used to fewer classes for shorter terms.” In contrast, she noticed the length of a university class she audited as “particularly long.”

Travel. Participants travel specifically for structured learning as well as for exposure to unfamiliar surroundings. John travels every 6 weeks with a movie theatre touring group learning about vintage theatres in the Midwest and connecting with others who have similar interests. Bess travels extensively and has seen “about every museum [she has] wanted to see in Europe” on seven trips. She looks forward to exploring China on her next trip. Gertrude believes travel has “contributed greatly to [her] learning process,” and has taken several trips to Hawaii, the Bahamas, and other locations in the United States for pleasure and business.

Beulah realized during her last trip to Ocracoke and the Outer Banks in North Carolina that abject poverty still exists in the southeastern United States. She learned that cotton and tobacco are “no longer king” and there’s [still] a “lot of poor people.” The Reed’s recently drove through Minneapolis, Madison, Chicago, and St. Louis visiting museums, taking photos, and studying architecture. Ethel travels to the Isle of Wight off England’s south coast to visit her brother’s family and to gain perspective on her life,

having grown up in England and then living in the United States for almost 50 years.

Participants also enjoy regional, one-day bus trips sponsored by the Osher Lifelong Learning Institute to learn about communities within 100 miles of home.

Fitness and nutrition classes. Two participants use exercise classes to stay healthy. Chester chooses not to “just sit around” and goes 3 days a week to exercise for an hour, ride the exercise bike, and work out on nine machines. Bess also goes 3 days a week to a senior strength training class. She learns about staying healthy and maintaining flexibility. The class’s two rules are, “You have to breathe and falling is not allowed.”

Computing and skill-based learning. The participants span a range of technical abilities. James “stay[s] with analog photography” and does not have a home computer, but he uses computers and e-mail at work. Bess has been using computers effectively since the early 1980s and regularly uses a home system. Mac recognizes the vast amount of information available on his desktop through the Web. Alex uses financial software and spreadsheets to help “do analysis on various projects” in property management, and works with a three-dimensional modeling program to design furniture. Ethel simply does “not like to use computers” because she believes books are still “the best way to learn.”

Mac’s farm background has helped him teach others about skills related to gardening and use of equipment with the soil. Alex likes “the sense of competency that comes from being skilled” in his interest areas. He has attended woodworking school in Maine, resulting in “ratcheting up” his “energy level” and “learning curve.” He discusses skill development at more length:

My typical day isn’t focusing on how I can go about learning something. It is more how can I do something productive and maybe get better at what I already

know but by practicing again a woodworking technique, or even something as straightforward as mowing my field, by learning where all the ruts and ravines and . . . goo-gahs are out there. I can be a more efficient mower. I mean, competency and skill sets are important to me. It is not a self-conscious learning though that I am involved with . . . I want to feel like I've done something creative every day. And I want to do it better than the time I have done it before.

Meeting groups. Many learners specifically attend meeting groups to learn.

Chester meets retired men at his church on Mondays for coffee. On Fridays he meets with a diverse group of local artists, retired professors, and intellectuals at the local cooperative grocery store. His extensive experience with men's groups, including starting and leading them, stems from his career in social work. Beulah becomes “energized” when she meets with her Monday night support group. She also meets with three other groups including a study club created in the 1860s in which she is the youngest member at 62. They recently invited a speaker to discuss his youth in Holland. James' drawing group provides a weekly creative outlet for freehand “life drawing.” He manages the activities of the group, which he calls a “gathering of people,” because it is not a formal class.

Special events. Many participants attend a range of educational events including lectures, live music, art, theatre performances, workshops, and church activities. John pursued his interests in history by attending a “Chautauqua tent . . . a couple of years ago” that presented “various programs on history.” The Reeds enjoy lectures at museums or other locations approximately once a month.

Mac remembers a lecture by a man named Diesel, inventor of the diesel engine, who stated, “We let the engine tell us how to design it. That is, when you make it, when a

part [breaks] . . . that part wasn't strong enough . . . so they'd make it stronger . . . and . . . kept running it until something else broke." Mac notes this crudely illustrates an example of the "weak link." Beulah appreciates her part-time status at work. She can pursue learning and spend time volunteering at the performing arts center because she does not "have some place to be at eight in the morning."

Public Television, CSPAN, CNN, National Public Radio. Beulah does not watch much television, but she knows the scheduled time when her public television station broadcasts *Masterpiece Theatre*, and she follows the season schedule for basketball games. James, "kind of a news junkie," listens to the news and *All Things Considered* on National Public Radio. He notes, "It's the BBC news on PBS at ten o'clock, and network news, CNN, *The News Hour with Jim Lehrer*." Gertrude also claims to be a "junkie" when it comes to watching programming about the political scene on CSPAN and CNN. John mentions, "One of my favorite programs is either called *Booknotes* or *Afterwords*, or whatever they are called on CSPAN when they have an author come up and talk for an hour-and-a-half on his subject."

Mac always listened to a public radio station "tuned in with classical music" while he and his crew built homes. He laments, "That has . . . gone by the wayside, in part because with one crew . . . they demanded equal time and I got tired of listening to hard rock or country western music. It felt like . . . a lesser of evils to not have any music."

Service groups and committees. Ethel purposely seeks out individuals of "varying ages" in her organizations including the Altrusa club, which hosts speakers and provides community services. Sam believes he imparts knowledge to others and gains knowledge

for himself while contributing to the community through a variety of service groups and committees. He served as the head of the university regents and with the county library board. He proudly states “when you walk in the door you’ll see my name on [the] plaque [in the public library].” Sam’s impressive service history also includes the United Way, a family guidance and service center, the local housing authority board, the editorial board of a large newspaper and more. He learns in these settings, primarily through listening, and notes that “listening is a skill that you really have to work at . . . to really acknowledge what [others] are saying and understand the meaning of what they are saying.”

Gertrude sees an “interwoven piece” of herself supporting her community through service groups. She helps these groups by using her education and feels she also grows by being involved. She serves the African-American community but also likes to “move a process further” with the broader community through activities such as her work on the hospital trustee board.

Learning Process, Influences, and Benefits

Participants understand how they learn and offer many ideas about the modes or processes of learning they use. Their learning influences include family members, teachers, friends, and mentors. They also receive benefits through learning ranging from enjoyment to increased mental activity. These processes, influences, and benefits combine uniquely in each participant to sustain learning throughout life.

Learning process. Each lifelong learner offered ideas about how she/he learns, what the learning process entails, and how her/his mode of learning facilitates her/his interests. The first broad theme, Passionate and Obsessive Curiosity, offers numerous

examples of learning driven by inquisitiveness. At least 11 other learning processes were provided by participants (See Appendix A, category 5.1 through 5.12). John explains his approach to learning, “It is a process where one thing leads to another. I don’t have an outline, an agenda to follow. One thing proceeds to another, leads to a discovery of something else, and I think, Oh that’s interesting, I’ll need to find more about that.” Liz understands a similar concept, having raised four children, that if plan A does not work, then you must go to plan B, otherwise you could be “disappointed, and frustrated, and angry.”

Alex’s concepts of his primary learning mode illustrate his action-oriented style. He notes, while discussing an opportunity to start his store, “The door opened and I stepped through.” Like Liz, he recognizes the problems in trying to create a long-term vision, and instead, “opened that door . . . walked through . . . and . . . let it unfold.” The theme of “doing” resounds in Alex’s discussion about learning. I ask Alex if his interests are “often in the physical world. Bicycles are something you . . . ride; woodworking is something you can run through a planer. Tractors . . . you can drive.” To this he responds, “I am probably the least spiritual person you will ever encounter in your entire life. And so, I live very much day to day in the physical world and that’s where my interest are, that’s where my comfort zone is, so the answer is probably yes.”

Ethel likes to talk with others to facilitate learning. She sits at different tables at her living community restaurant, meets people, talks with them about going to learning events or readily shares information. Gertrude emphasizes the value of listening in learning:

The other learning piece for me is just listening to people that I'm around and if they're doing something interesting or exciting that I can learn from, then I try to latch on and . . . find a way to participate in those activities.

The fact that James's learning process relies on visual learning only makes sense because of his lifelong dedication to the visual arts. He tends "to flip through the books" in his library, and to "treat them very much like picture books more than reading for content." Alex also relies on visual input to learn. He clarifies, "If I can watch someone do a process then I can usually understand the process." He also notes his logical thinking results in a linear process that builds, step by step, from beginning to end.

Mary's approach to learning varies from Alex's pure linear and logical approach and includes her feelings about accomplishment. She explains her creative process, "I believe that . . . photograph is the best . . . I have ever done. And, it may not be true from an outsider's point of view, but I always feel that I am progressing by having more and more experience." However, Mary and Alex both refine previous abilities in their learning styles. Alex refines a technique in subsequent skill-based activities by using the technique, whereas Mary organically understands how her current work represents an improvement or refinement from previous work.

Liz's learning includes a Zen-like approach in which she embarks upon a circular journey of interconnected ideas, people, and events. In her view, things that start in a simple way may end in the same way through a circular path of life. She notes, "Everything I learn along the way will affect the outcome. And I don't know, maybe that outcome is the beginning of a circle."

Chester's experience with death and dying caused him great anxiety and discomfort, which he eventually overcame through positive action by learning more about the topic. Liz agrees with Chester—a cycle of discomfort can agitate and cause a person to seek comfort. She discusses going through a “bumpy” period, “Getting out of the box . . . sharpens my senses . . . you look for equilibrium . . . you look for balance.”

Sam sums up his learning process frequently by simply stating, “Right place, right time!” He humbly notes his “whole life has been a matter of . . . good fortune and right place, right time.” Sam also reinforces the idea that one cannot always predict the future, and sometimes he “just kind of wait[s] to see what opens” for him.

Influences. The participants experienced many influences while learning, including family members, teachers, mentors, and friends. These influences greatly affected the participants' lives and learning abilities.

Many participants' fathers played significant roles in their learning process. Ethel's father influenced her because he “was very intelligent [and] was a lifelong learner both formally and informally.” She followed his lead by attending adult education classes in England. He was also a member of a local history society. Liz's and John's fathers were scholarly and read several hours every day, greatly influencing their children. Bess's father required her to account for every penny he gave her from the time she was 13 until she graduated from college. She notes, “That was a chore and I hated doing it, but, it certainly taught me a lot.” James's and Mary's mothers and fathers were college-educated and held high expectations for their children. Both sets of parents simply assumed that their children would go further in school.

Chester mentioned his son several times when we met for interviews. His son influenced him during a jog along a California beach and helped Chester think about the real estate deal that had caused him considerable pain. During the jog they stopped, and his son said, “Dad, what is the lesson you need to learn from this experience?” Chester notes, “And that’s what set me off, that’s when I became angry.” Chester responded to his son, “What do you mean what is this lesson that I need to learn.” Chester’s initial reaction included anger, but as he considered his son’s question, he decided to think about the situation and learn from it so he could provide a concise answer and reach a resolve. Liz’s children also influence her by recommending books such as *Awakening the Buddha Within*, which her son suggested to her.

Sam reflects on his parents who were, according to him, outstanding people in their community but uneducated. He also thinks about his influence on his children. After a discussion about attaining his PhD he begins a sentence but stops short of the final phrase due to emotion, “It’s a sense of pride, I have to tell you. My folks died a long time ago . . . I would have liked to [have] told them, yeah, your son [he implies: is now Dr. Ybarra].” He provides a role model for his children, especially because he personally understands not having one with an education, despite his parents’ good hearts and outstanding reputation in their community.

Both Chester and John have been influenced by their grandfathers. Chester’s grandfather lost his farm in 1939, resulting in a learning experience Chester will never forget. John’s “grandfather was quite successful, but he never had time for his family.” After working “all the time” he died young. This has influenced John regarding his own

balance of work, relaxation, and lifelong learning, which in his opinion, needs to be balanced more toward the latter two.

The participants' spouses and friends also influenced them in learning. Gertrude and her husband married at the age of 16, and together they "became problem solvers very early on." Mary has never formally taken photography courses. Instead, she has learned from James. She notes, "He is my technical expert to go to when I have questions." Sam completed his master's degree in 1970, and by 1979 worked as a general director of personnel in a school system. Sam's close friend, the assistant superintendent for personnel, said, "Let's go get our PhDs." Sam says, "He talked me into it!"

Mac still remembers the influence of a mentor he met when he was 25 years old. A "hermit" taught him the "value of being your own person and being true to your own values, even if being true . . . meant that you have to step out of society." Mac's hermit friend lived a "monastic life." He survived on an "extremely low income," while reading a variety of books and practicing lifelong learning. Mac's college Spanish teacher also influenced him to read radical literature by John Holt and Ivan Illich, which still influences Mac's concepts of appropriate education and lifelong learning.

Gertrude's English teacher influenced her to learn by telling her "that [she] could do almost anything that [she] wanted." Alex expresses a high level of appreciation for a leading local wood craftsman who has helped him learn how to build customized furniture. Thinking of the craftsman, Alex exclaims, "He is beyond amazing!"

Benefits. Participants recognize that lifelong learning provides many benefits. Ethel believes learning keeps her "brain active" and allows her to "just [try] to keep up with the world around [her]." Mary thinks it makes life "more interesting" and

“structured.” Bess enjoys the stimulation from lifelong learning and acknowledges that it provides her “the opportunity to learn things [she] wasn’t exposed to . . . in college.” Learning also helps Bess and Ethel meet new people. Several participants received a high level of self-satisfaction and enjoyment from lifelong learning. Mac elaborates:

The main thing is I just enjoy it. I enjoy learning. I enjoy feeling like I can be an informed citizen or informed participant in the culture, in the society. Sometimes I guess I think it’s important because, maybe injustice is too strong of a word, but there does seem to me that there are people who are quite willing to take advantage of people. Whether they be the Ken Lays of Enron, or the politicians who are responding to their biggest contributors’ needs, which may not be very altruistic. And so sometimes, just an awareness is almost a means of self-defense.

Liz explains the self-satisfaction learning provides her after spending 28 years dedicated to raising her children:

I didn’t really have . . . time to develop my own interests. Now I see this as a very selfish thing, and not really something I . . . want to share with anybody else in my family. It’s just something that I . . . do totally for myself. And that’s really the way I feel about art. And people will ask me to . . . paint this for them, and I really don’t want to do that, cause it’s really not about doing it for them, it’s doing whatever I feel like doing.

Chester believes lifelong learning helps him become aware of other cultures. He recently read about the Iroquois and Hopi Indians and studied their Shaman. Liz also enjoys learning from and about other people. She tells a story about a woman who

brought her aging mother to an art class in which Liz was enrolled. The daughter explained that her mother “was in the hospital for 4 days last week because of dehydration, and she won’t drink anything but . . . gin and [tonic].” Liz continues, “The daughter said, ‘Well I tried just giving her tonic water to get her to drink,’ and the woman looks at me and said, ‘I’m not stupid!’” Laughing, Liz declares, “I just love those people!”

Gertrude benefits from lifelong learning because she’s “still involved.” She explains, “You’re still part of ‘the living,’ contributing and seeking and the whole piece, that you’re not just sitting off somewhere.”

For some participants lifelong learning benefits them most because they can apply what they learn. Sam explains, “The learning, the being able to do, the processing, the experience in leading people, directing people, that all became a part of who I am . . . It comes to me like common knowledge.” Gertrude agrees and even called and left a phone message for me clarifying how she felt about applying knowledge. In that message she said, “When I learn I always find ways to apply what I’ve learned in my life, even when I study history. I am always looking for that type of connection to apply what I’ve learned.”

John benefits from lifelong learning by incorporating his work and learning into his lifestyle. He spends time and money learning and then applies what he has learned to his business. He states, “I need to do this travel so I can write the story for the catalog, and I can allow myself some time to read these books because it is for my story, which is for the job.” Sam also integrates lifelong learning holistically into his life. He summarizes the benefits of lifelong learning, “I don’t know how you can even label it because it has

been such a . . . whole frame of life, [a] continuous series of experiences and opportunities . . . learning, training, studying, whatever it is that has allowed me to do those things.”

Sam, like the other participants, understands his role as a lifelong learner and how lifelong learning has benefited him. The next section discusses in more detail the many roles played by participants relative to lifelong learning.

Roles

During my time with participants, I asked them to tell me about the role they play in lifelong learning. Several learners grappled with the question and asked for clarification, and in response, I reframed the question to help them understand. Initially, this concerned me, and I wondered if I had chosen the wrong question or if I had incorrectly phrased it. Ultimately, through lively conversations, a wonderful range of descriptors were provided about roles participants believe they play in their unique lifelong learning environments. These descriptors included mentor, elder, spectator, community builder, doer, critic, micro manager, top expert, vision provider and many others (See Appendix A, categories 7.1 through 7.18).

Chester quickly responds to the question about role by indicating two functions he has assumed as a lifelong learner, “I also see myself as a mentor, one of the elders in the community.” Sam also sees himself as a mentor. He explains his role in an agency helping delinquent dads, “People come in and talk to me all day long, you know, my wife and I are breaking up, I’m committing suicide My bills aren’t being paid. And so I used to help resolve those problems.” I ask him if the interaction entailed a learning experience to which he humorously replies, “Yeah. [I was] a mentor . . . a mentor for

romance!” Reflecting on his activities as a store manager and educator for his staff, Alex believes his “mentoring had to do with trying to get people as far down that path with . . . enhanced specific skills as possible.”

Aside from his role as a mentor, Chester also sees himself as “more of a participant than a spectator.” He clarifies, “That’s a problem with our society. Many of us have become spectators. We watch it on TV or go to the ballgames. We do this but we don’t become participants . . . we have become lazy and complacent.” Alex also sees himself in a basic role of “participant in the world trying to develop skill sets.”

Ethel prefers lifelong learning in an intergenerational setting in which she interacts with people of “varying ages.” She emphasizes her role as a listener, “I get to hear about people’s day-to-day activities and occupations, whereas if you’re in a senior citizen group almost everybody is retired.” Sam also emphasizes listening, “Just learning and listening. And you know learning has two parts to it. Listen to something, but you can also ask questions as well. Because if you don’t probe and ask, you miss part of what’s going to be done.”

Several learners emphasize a need to build community through learning activities, and see themselves in that role. Mac discusses his desire for a true learning community:

There’s a vibrancy that’s brought to a community that has . . . this web of connection. In fact, maybe it’s a response to a fear I have that now that we have the internet web . . . we think . . . we have these connections, and to some extent we do. But what’s missing is that personal interaction.

John believes a “huge change in the local environment” has taken place because of the big box chain stores. Because he sees little distinction between his career and his

lifelong learning activities, he relates his role as a lifelong learner to his business activities in the community as well. He explains:

Sending our money off to Bentonville, Arkansas, or wherever the corporate headquarters are, drains our money out of our economy, but it also drains the unique sense of place that [our hometown] has. It drains our sense of place away. So I think, without being arrogant . . . [our home town] is better off with my presence here. I think we help shape the character of [our home town] counter to WalMart or Target or whatever and keeps us, you know, a little bit less homogenized.

Mary sees herself primarily in the role of a student, and notes, “I am the kind of person that sits in the front row and pays attention.” James also tries “to be a good student and do what’s asked of [him] to the best of [his] abilities” when he participates as a student in a class. Gertrude simply states, “I guess my role in lifelong learning is to be a learner. Somebody who wants to learn and use what I learn in some way.” Liz also sees herself as a learner and believes that “learning from others is the best learning you can do.”

Mac, who identifies with being a student, believes that students also teach, and looks for learning everywhere. He offers clarification:

In a lot of ways there’s some teaching going on too. That is, it might be teaching by example, it might be teaching by modeling, it might be just teaching by conversation. But, having been a secondary teacher for part of my life, I guess I’m aware that everybody learns in different ways and almost any environment can be a learning opportunity.

Sam, a real active “doer,” believes his role as a lifelong learner involves doing the things he does best, including “guidance and mentoring.” Sam also plays the role of critic in learning environments. As a participant in a lifelong learning class he “may be somewhat judgmental” about professional presentations that do not connect with the way the real world works based on his experience.

Alex believes another role includes providing vision to, mentoring, and critiquing people who work in a hierarchical system. He states:

In a small business that has been grown from the ground up from nothing, typically the top of that food chain has maybe not the best individual skills at all the various tasks required, but they have the most collective visionary skills to understand what the whole needs and enough skill at all of the jobs that they can both mentor and critique the performance of anybody doing the job.

Alex believes he functions best as a micro-manager, at the minutia level of daily business. He believes his critiquing activities help employees to be “better at the specifics of tasks.” Although he understands the role of micro-manager worked best for him, he acknowledges others manage learning interactions in different ways that fit their individual styles.

Ethel believes her role includes influencing others to stay mentally active. She explains, “Living in a retirement community as I do, part of my role is to try to keep people interested in keeping their minds alert, and if possible, participating in lifelong learning.” Chester helps men in his men’s groups learn how to talk about a range of topics other than their golf games, their cars, or stocks and bonds. He explains, “I try to get the men to sit down and talk about what is really bothering you in your personal life

that we can maybe help you with.” James also influences his university students as a “stand up lecturer.”

In church-related learning situations, Ethel sees herself as a knowledgeable person with much to share. She states, “I definitely have a role there as a person who can answer a lot of questions.” Sam believes he also has a lot to offer as an expert and explains, “Well, when you talk about roles, this is what comes to my mind, and it’s intertwined. I look at it like imparting knowledge to others—being able to do that. Gaining knowledge for myself, and then, contributing to community.”

Several learners see themselves as leaders in the lifelong learning environment. Chester has led men’s groups; Sam has led in school systems and remains very active in the broader community; Ethel leads in her retirement community and church; James leads in his university job and with his drawing group; and Gertrude leads through her work in the community.

Mary points out another role she sometimes assumes—that of a consumer of lifelong learning. Beulah notes that she “orchestrate[s] keeping life interesting” for herself as a self-directed learner. Gertrude also knows how to learn through her own resources. She states, “I know how to make contacts, and get to whatever it is I want to do.” The participants’ impressive range of roles in lifelong learning parallel the range of issues they identify as important to them.

Issues

Participants expressed concern about a range of positive and negative lifelong learning issues (See Appendix A, categories 14.1 through 14.19). They expressed heartfelt concerns about remaining active, learning now what they missed earlier in life,

aging, lack of time for learning interests, reaching their learning goals, having social connections, and other issues. Several lifelong learners talked about the issue of finances, but each expressed considerably different approaches to finances and learning. Bess recalls her desire to learn about money when she was younger. She explains how she had thought about:

learning how to take care of . . . money and invest it and find people who could assist [her] in those endeavors, knowing that [she] was going to be a widow eventually—statistically most women are—and being prepared to take care of [her]self because [she is] pretty independent.

Alex describes how he and his friend learn from each other when he provides financial information and the friend helps with his tractor's hydraulic systems. Chester has been interested in financial planning throughout his life, reads literature about it, and helps family members and others make good investments.

Mentoring ranks as an important issue to Sam. He remembers arriving on his job at a school and seeing Mexican-American kids “sitting in the hallways not going to class” and thought, “This is . . . [a] . . . poor example . . . so let's do something about it.” He organized scholarships and bonded with the kids “in a positive way,” helping them realize they could make it in college. Sam has seen the cycle of school personnel not helping children of lower socio-economic status and desires to stop the “benign neglect.” He states, “I think it is an obligation on my part as an educator, someone who stands to see the relevance of education and getting ahead.”

Chester contrasts two issues, helping people, and focusing only on money, “Yes that [helping people] would be an issue. That's a positive thing. And certainly the

negative part of that is just focusing on . . . how much money you can make. That is what I was doing before because of what had happened with my grandfather in losing his house.” Gertrude enjoys helping others too and explains how this helps her, “I’m focused on what I can do to serve the community and to bring whatever education I have into helping, but at the same time I feel like I also grow myself by being involved.”

Alex finds different ways to help people with learning. He explains how he helped a family. “A friend that I know, a minister, his daughter needed help paying college stuff. They had medical issues they couldn’t work So I paid it. You know, I mean . . . like that! It’s kind of neat to be able to do that.”

Keeping her mind agile is an important issue for Ethel. She states, “Keeping my brain active, I think, or trying to. I’m trying to keep up, not I must say in an all-around way, but just trying to keep up with the world around me.” Chester wonders about other older learners and their minds:

I’ve got arthritis really bad and I have trouble walking. My mind has stayed active and I think that is good. The people that I do feel sorry for are people with Alzheimer’s or [they] can’t function at [a normal] level. I wonder about that. Is that because they haven’t kept their mind active or is it just a process of the culture or genes?

John believes “keeping your mind more active makes you better at your job, being a friend, family member, or just about anything.” Bess notes, “I am concerned about keeping my mind active because I live alone, and so I don’t have anyone to talk to every day . . . like . . . with a spouse or . . . children living with you. So that’s a big part of it.”

Mary believes taking lifelong learning classes “keeps you more active and youthful.”

Bess agrees because she does not want her “life to be stagnant.”

Many participants agreed about having fun while learning. Beulah, Ethel, Sam, John, Liz, and Alex specifically mention learning is or should be fun. During a conversation about her experience with lifelong learning, Liz exclaims, “It’s fun! I feel really lucky because I am able to participate in different classes. And just to take the time to learn about things . . . I have been curious about but otherwise wouldn’t have the opportunity to know about.”

Mac enjoys the social and learning aspects of education. He explains, “Part of it is socializing . . . and by socializing I mean not only rubbing elbows but actually getting to know people who have had rich backgrounds to share.” Beulah agrees socializing is “really a large part of it” and attending an educational event with a colleague “really enhances the experience.” She notes a significant experience, “One class was weaving and I met a nurse. And then when I was in the hospital having surgery, she happened to be the night supervisor.”

Even though Liz thoroughly enjoys people, she makes it clear education remains her focus for taking lifelong learning classes. She explains that with some of the older people, classes primarily serve a social purpose whereas she’s “not looking for an outing.” Bess enjoys “being in a community of people who are learning” and “hearing other people’s comments and questions.”

John explains how his motivations for taking lifelong learning classes may differ from other people:

Some of it is social, the movie theatre thing that I go to. I enjoy all the people that we interact with, we have a common interest But the Osher part, I would [emphasize] less on social, not that I am ageist, but . . . I didn't see it up there as a strong common bond to a subject within that group. It was older people pursuing a common activity.

Ethel has enjoyed learning things she missed earlier in life having been born in England. She explains, "Being foreign born we really studied no American literature. Perhaps a little Longfellow . . . no Thoreau or others." Bess shares that issue and explains how learning "gives [her] the opportunity to learn things that [she] wasn't exposed to when [she] was in college."

James, Mary, Ethel, and Beulah feel isolated at times from having the social connections they want. James explains, "I would say another component in terms of our lifestyle and our life history is that we are relatively isolated. So we don't have an extensive network of personal friends that we socialize with on a regular basis." Mary reinforces James' comment, "Our friends are a long distance away; our families are also a long distance away."

Another issue, aging, surfaces with a few of the participants. Ethel discusses her memory as she ages, "I don't think I was [ever] perfect about it, you know as I'm getting older I'm not quite as, my memory isn't quite as good for names, isn't as good as it used to be." Sam discovered other issues involving aging when he retired:

For about a month I did nothing . . . I just laid around. But then . . . the itchy foot was starting. So . . . I started looking for jobs and I . . . learned something else at that time. The world is not waiting for me. I had a good reputation in this town. I

was well-known. I know a lot of people. I applied for some jobs. The first thing I got was . . . 'you're a personnel guru.' Yeah I understand that. I want to try and do something else. 'We'll keep you in mind.'

Beulah implies that aging may have separated her from other students when she audited a “very hard” class. She mentions there were not “many nontraditional students” in the class and found it “odd to be so unique.” She laughs and explains, “It was just very different leaving class and everybody picking up their phones. That is very different.” Bess noticed recently she does not “hear very well anymore,” and the hearing loss affected her in classes. After getting hearing aids she told her exercise class teacher, “For the first time I am now able to hear everything that [you say].” The abilities to hear, talk, and read are very important to lifelong learners. One of these issues, reading, was discussed in an earlier section—the importance of reading. In that section, three learners talked about their problems with reading.

Some participants find the issue of scheduling affects how much they learn or when they learn. Retiring has not completely freed Beulah from time constraints. She mentions:

While I was working, I limited things I did in the evening. I was just worn out. So now I'm still selective about what I do as . . . I have less life responsibility. I'm still worn out in the evenings. I need to be picky about what I do.

James states, “One of the issues is just finding time.” John strongly agrees, “My only regret is that I work too much and I don't spend more time pursuing these interests.” Liz addresses the issue of time she spends on painting, “I don't spend enough time doing

it . . . I find that I don't paint when I'm at home. And it is really making the effort to go some place and do it."

Among the participants, Ethel was the only one concerned that others may perceive her as an intellectual snob. She explains, "I think the danger is that you frighten people if you give the appearance of being a person with lots of facts in your head." She notes her "British accent doesn't help either," and she might sound "a little bit too precise at times." She does not want to sound "dogmatic or too snooty."

Gertrude emphasizes the issue of applying what she learns in every situation. She notes that "everything is practical" and sees herself as "somebody who wants to learn and to use what [she] learn[s] in some way." Sam also lives to apply what he has learned as he interacts with students and others every day. Perhaps their history as proprietors motivates John and Alex to apply knowledge rather than simply attend classes without using what they learn in some way. Both have found ways to integrate their knowledge by applying it to their businesses.

Gertrude revealed an important goal she embraced many years ago but no longer embraces. She had hoped to complete a doctoral degree. She mentions how being 44 at the time affected her decision, "I think that realizing how old I was at that point, and if I was going to get it, I would have wanted it to be meaningful in a career kind of situation. And career was running down." Mac identifies with Gertrude's issue of returning to school later in life. He states:

Some of these may be excuses that I came up with to not go on through my plan.

It was rather sobering to realize that since I didn't have any previous journalistic

experience, even with a master's, I would be out there and my main competitors would be kids fresh out of college who had no family, who had no obligations.

Participants who attended formal lifelong learning classes discussed both positive and negative issues about their class experiences. Bess enjoys the lack of stress because instructors do not require assignments. She does not appreciate it when an instructor in a lifelong learning class asks students to complete an assignment. She solved the problem by dropping “a couple of courses.” Another issue relates to problems associated with the simple logistics of attending. Beulah explains the difficulty of “getting there and parking, getting into the building—just silly things.”

Mary experiences frustration because she cannot easily enroll in photography classes at the university. Several factors interfere with her enrolling, but mostly she lacks “full-time student” status. This makes enrollment a much more involved and complicated matter. She also chooses not to attend less interesting classes if they are out of town, but she may attend such classes if offered in town. Mac has trouble leaving work to take daytime classes, and after a long work day, he often feels too tired to attend classes.

Liz appreciates that Osher classes do not cause her pressure. She explains, “I think the fact that there is no pressure, and you know if you're not really [interested], if somebody is talking about something that you're not really interested in, you certainly don't even have to listen any more.” However, she has “never felt like [she] wanted to get up and leave.” She continues, “I don't think I will be taking any formal classes just because I don't really want that kind of commitment. I don't want to be working for a

grade. And I don't want to have to be some place every week. I am . . . over that phase of my life.”

Beulah enjoys learning with people her own age compared with taking classes with younger, traditional college students. She notes, “With something like Osher, you know, there's a wider range of people my age and older.” James needs structure to achieve what he desires. He states, “So to have structured activities in the community, in the environment that I could partake of or participate in is a good thing for me.”

The array of motivations to learn, favorite study topics, types of learning activities, learning processes, influences, benefits, roles, and issues offered by participants illustrate each lifelong learner's uniqueness. The next section exposes the participants' expectations about learning, needs for self-determination, and other self-reflections.

View of Self

Participants freely offered ideas and information about their satisfactions with their learning processes, attainment of competencies, academic goals, daily accomplishments, self-reliance, self-determination, and an assortment of other self-reflective and personal growth issues (See Appendix A, category 15). I also enjoyed learning what participants envision for themselves in their learning futures and address those issues in this section.

Self-expectations. Chester acknowledges he is “absolutely” satisfied with his learning process and states, “I think I am very satisfied with what I've learned.” Ethel qualifies her satisfaction, “I think so, I wish I had a better memory. I enjoy collecting facts . . . and I have some friends who can remember everything they've ever learned and

everything they've ever read." Despite having many other interests such as her grandchild and her yard, Beulah finds time to learn in classes and as a docent. When I ask if she is satisfied with learning she replies, "Hmm, well yes, I think so."

Gertrude also expresses satisfaction with her life of learning. In response to the same question, Sam states, "I'm satisfied. Life has been good to me." Mary expresses her satisfaction with learning:

Yes, it is satisfying. But my regret is that sometimes I don't take notes in certain situations. We have a friend that always has index note cards in his pocket. And he writes down what we are talking about . . . I am dissatisfied because I don't take it seriously enough to write it down and try to remember. I just take it in as a whole, and I sort of regret that sometimes.

Alex offers a two-fold response, "There are two ways to answer that, depending if you are looking back at life that has passed to date, or whether you are looking forward wondering what the rest of your life looks like." He continues:

The way I have learned has stood me in good stead through life . . . cumbersome for a methodology maybe compared to others . . . but I'm content that I have learned what I have been interested to learn and challenged to learn, and seem to have learned them well enough that I have . . . been reasonably successful.

Alex then addresses his future learning potential by returning to his reading concerns:

As I go forward, I wish that I learned more readily by reading, that I was a better reader. Life is a diminishing resource, and as I get older and have less ability to physically see well if I am observing or physically [doing], if I try to learn new skills, or . . . looking for ways to be entertained . . . certainly reading would be a

skill that . . . would behoove me to get better at . . . I think [reading] is for most people more acceptable rather than the hands-on style that I have developed up to this point in life.

Satisfied with her learning process, Bess responds, “Yes, I am. I don’t have the energy level that I used to have so the kinds of classes that I take from your group [Osher] are such that I can pretty much work them into my schedule without feeling pushed or stressed. And I lead a pretty lazy life any more.” James “would probably say that [he is] not satisfied.” He explains:

I’m a little bit lazy, and maybe I don’t pursue things with as much enthusiasm and discipline as I think I should. I think I should read more. I think I should perhaps be a little more focused. I should maybe be a little bit more disciplined. I mean the drawing group is a discipline actually, so, because to a certain extent that I am doing it with or for other people, I tend to be more disciplined about making the arrangements and . . . have a model [for the other artists to draw].

Mac also expresses dissatisfaction when I ask if he is satisfied with his lifelong learning activities:

No, that’s a feeling I’ve had for several years that I really need to change careers. It may sound funny since I’ve talked on about . . . enthusiasm for some of what I’m doing in the construction business. But it is not what I was trained to do and it’s not even what I’ve had the most experience doing. I do think I can make an impact. It also tends to, particularly at my age, it’s taking a pretty heavy toll on my energy level. I mean I don’t have the time for the mental sharpness, the mental

energy to be as sharp and continue doing some of the things in the evenings that I want to be doing.

John maintains high expectations and explains why he lacks satisfaction with the learning process:

One of my favorite quotes is, ‘Show me a satisfied man and I’ll show you a failure.’ I think it is T-bone Pickets . . . or some oil billionaire, and I think it is the same guy who said, ‘The reason more people aren’t multimillionaires is because they get to a point to where they feel satisfied, or they get to a point where they feel comfortable, and then the drive to do more lessens.’ In fact, I enjoy what I am doing a great deal. But my tendency, even if I have done my best work, is to not see what I did right but to see what needs improvement . . . I’d rather be unhappy with something good, than satisfied with something mediocre if those are my two choices.

Participants also describe how they view their attainment of competencies through lifelong learning. Beulah describes taking Osher Institute classes, her work as a docent at the art museum requiring formalized meetings twice per month, and her involvement with auditing a class. Then she states, “My personal goal for the year was to learn more about contemporary art. . . . That’s one of the commitments you make.” Liz also expresses concern about gaining competency in a focused area:

I have so much more to learn. And I don’t feel . . . the kind of confidence that I think would come with being an expert at something . . . maybe you never feel that way. Maybe there’s always more to learn. So, I don’t know, but I’d like to get

to the point that I just feel really comfortable with something. You know . . .
that I just feel that I can communicate it and love it.

I thought Liz's expertise as an occupational therapist would satisfy her need to attain specialized competency. When I ask her why she does not see herself as having a depth of focused knowledge, given her training and work in occupational therapy, she states:

As a therapist if you are not working every day, and not out there treating patients and being with people then . . . when you step back into it . . . you have more experience and knowledge than the average person on the street, but you . . . need to do it every day.

Gertrude had high self-expectations during her formal academic career. She explains:

I expect to learn as much as I possibly can. When I worked on my master's, I selected the chair of the department to be my advisor, knowing full well that that was not going to be easy [because of the reputation of the chair].

Chester's concepts of attainment prior to returning to school as a mid-career adult were well-formed. He explains:

I got . . . excited. I thought, OK, I'll do an undergraduate . . . and a master's degree . . . and that's what I set out to do. I saw myself the first day I started [at the local university]. I saw myself coming [through the graduation ceremony at the larger university]. And I did!

The above examples illustrate long-term attainment, but participants also express views about daily learning attainment. Gertrude thinks constantly about learning and explains her daily inspiration:

I look at learning as during the day each day I am going to learn something . . . if I open up my eyes and really take hold of it. And so, I . . . feel . . . this particular time of my life is a time I am not working and I don't have to do things, and I can do those things that I want to, and so there are learning opportunities all around me.

Liz notes that she “can learn anywhere” and that she “pays attention,” and tries “learning something every day.” She sees learning as “little everyday miracles . . . that become a real part of [her] life.”

Self-determination. Many learners expressed their needs to determine their future lifelong learning activities. Beulah's concept of “self-orchestrating” to keep life interesting, and Bess's desire to find “new opportunity” as an older single adult illustrate the independence each of them demands. Liz addresses her individuality and autonomy, “I am better educating myself and finding out about things in the world, and then I can actually have a just interpretation of what's happening when I do read the news, than I just accept it as fact.” Alex strips it down to the basics, “I'd rather do it! I'd rather be self-reliant! I think self-reliance is a huge cool attribute.”

Chester talks about dissatisfaction and control over the learning process, “If I'm not [satisfied], I'll change it.” John becomes philosophical about self-determination:

We're given certain personalities and genetic traits without doing anything. For a certain point of time after one's childhood is over, it becomes the responsibility of every adult to determine who you will be. And if you don't actively create who you are, you just exist in the inertia of doing nothing. And so, I suppose . . .

lifelong learning is the constant reshaping of who you are by what you are drawing from outside sources.

John's comments obviously place full responsibility for shaping one's self on the individual.

Liz discusses why she continues seeking lifelong learning opportunities, "I just kind of do what . . . I enjoy. I am not doing it to please anybody else. I'm not doing it to prove anything to anybody, to compete with anybody intellectually." Bess expresses very similar ideas:

At my age, I think I have done all the things I have had to do, I was required to do. And so now I don't do anything that I don't want to do. That sounds hedonistic but I just figured . . . as long as I kept my nose to the grindstone, now I can do things that pleasure me.

Self-reflection. The participants also offer self-reflections about their self-esteem, wisdom, personal growth, and identity with others. Bess reflects after taking classes about politics, "As I get older and wiser, I guess, I have more time to think through some of the really nitty gritty political questions that we are facing in this world right now. In response I ask, "How do you realize that you are wiser?" She explains:

I think I make better decisions. I have my closest friends who don't have the same political attitudes that I have, so I know I am wiser because I have learned not to be so argumentative with them. Used to be kind of fun to jib and jab and now I don't do that anymore because I realize that my friendship is more valuable.

Bess believes she became more "wise" when she was in her "late forties" after having to make big decisions that forced her growth.

The participants' thoughts about learning reveal "big thinkers" and a "small thinker." Mac explains how attending a Mozart concert helps him enjoy being human and enriches him as a world citizen. He states:

It's at the same time part of the motivation for wanting to do something. Wanting to somehow leave the world if not a better place, certainly slow its demise. And wanting, I guess from a teacher's standpoint . . . to make sure other people have the opportunity to discover the same thing.

Liz also thinks "big" thoughts about her lifelong learning process. She has been embarking on the journey of discovery her "whole life." She explains:

I see myself heading towards something. That everything I do is part of that process, part of that journey. Everything I learn along the way will affect the outcome. And, I don't know, maybe that outcome is the beginning of a circle.

Beulah expresses a much more restrained perspective or scope about lifelong learning. She discusses a person's passionate speaking ability at a fundraiser. I ask if she has that same passion. She explains, "I do think at that time, no I don't think of myself that way." She continues to describe her approach, "Mine would be more compassion. I . . . try to . . . work with the daily folks. That's all that I really do with the [agency]."

Alex enthusiastically embraces a smaller world view:

[I'm] not a big thinker though. I mean my ego wanted people to know about it.

But that's nothing 'big thinker' about it. Every single year I would start in

February. The trade journals came out every month and every time I'd go 'Gee I

wonder what kind of year we're going to have this year?' I had no idea what

motivated me. I knew how to take advantage of whatever walked in the door. I

was never a big thinker. I'm not a big thinker! I'm a complete little micro-manager, massively efficient highly skilled manipulator of day-to-day opportunities; that's what I am. That's exactly what I am. I am the antithesis of a big thinker. I take short-term solutions. You know, even in the real estate business deals, ah man, a short-term bird in the hand is way better than an opportunity down the road. I mean, screw it, I don't know what's going to unfold between now and then. But, man, if I can do this and that then I can take that money and do all of that, sure let's do that. I'm not a big thinker at all. I used to describe myself by saying I'm the guy who got absolutely the most from the least.

Some participants identify with another person or persons. Gertrude has lived with her husband for 53 years. She and her husband learned together how to participate more fully in life but felt when they were younger they had little conversation to offer others. They reminisced about this recently and recognized how profoundly they have grown as partners and as communicators throughout their lives together. They now converse with anyone, any time. Mac addresses maintaining hope while being "just one person" in a complex world. He explains:

Well, you hook up with other people who are, by their nature hopeful also, and I don't think truly despairing people are lifelong learners. I don't think they're motivated. So I think almost inherently that someone who is trying to learn new things or learn more about something, that act in itself is an expression of hope, or hopefulness. Seems kind of like a natural place to gravitate towards.

John also strongly identifies with other people through his process of learning. Through reading biographies of successful business people, he learns "what drives

somebody to be successful in life.” This helps to “create a path” for him to success. He says, “Or maybe I see myself in them or I am trying to copy them, I’m not sure which.”

Some participants directly discuss their personal growth through lifelong learning. After Mary expresses how she experiences personal growth by producing each piece of art, James compares his viewpoint to her ideas, “Maybe not so self-consciously, but clearly there’s a personal growth component to it The 9 months . . . I am teaching I am pretty preoccupied with that. And, of course, when you are teaching you are also learning.”

Life’s next phase. The participants speculated about their future with lifelong learning and generally with life. Chester had been thinking about becoming a life coach and had ordered a book to learn more about doing that. He explains his current thinking:

I don’t want to go back into business . . . and do that. I wouldn’t mind helping people in this area if they would want me to do that, but more of a just a giving of my time of doing it rather than doing it for a fee I don’t think that’s what I want to do with the rest of my life.

He discusses the appropriate time in life to make money, then comments, “Yeah, I don’t need that. I’ve done that.”

James speculates about his future and retirement:

It depends, like I’m saying, how the body holds out. I would hope to really become more of a full-time artist [Y]ou see all those papers over there? Most of what I do on a weekly basis are drawings. You know, ink, you know. I do have a few finished paintings downstairs actually in her studio, but hurrying, like I say.

I have done all kinds of large scale paintings before I [became a professor].

So, my sense is that I would actually not only draw but also start to do paintings [W]ell I'll never catch up, but I've got such a back-log of work that's never been realized Right, it's all potential.

Mary's future may include winning an art competition. She has submitted two pieces of photography into a competition sponsored by a residential living community. One photo was of Millennium Park in Chicago which houses a structure by Frank Gehry, the architect, around an outdoor auditorium base. She explains:

And so I took some pictures around that. And, the other one was a Frank Gehry art museum in Milwaukee, in Minneapolis Because his work is so extraordinary. Not too many people have seen them. In fact, this is the first time I saw them in person. I had seen pictures. But they are very weird and wonderful They're steel, or brushed aluminum.

James joins the conversation, "They're steel, but they're very curvilinear, very complex, and very curvilinear . . . a lot of reflections, shadows." Mary noted the competition prints "calendars and cards from photos they select as winners," and that appealed to her.

Beulah focuses on her immediate future, "I can't hardly seem to get through the mail. You know what I mean [laughs]?" She plans on taking more classes about American art so she will "be prepared when they re-open a particular gallery at the Smithsonian." As a docent, she plans to present slide shows for children in third through sixth grades. This will prepare them for a museum trip.

Sam reminds me his "whole life has been a matter of good fortune and right place, right time." He hesitates to predict the future and understands he must "wait to see what

opens” even though he knows he will continue consulting and working in the community. He encourages others to plan and write what they want for themselves in the next 5 years onto pieces of paper and “put them away.” He continues:

I say you don’t take them out every day. But you know unconsciously in your mind, those things are there. And once in a while you take them out and in 5 years from now, take out that piece of paper and see how many of those you’ve actually accomplished!

Liz recently gained a new appreciation for the value of painting in her life. She explains:

Well, I would say that the thing I find that I miss the very most is, I miss painting, and when I don’t do it. And I think I’ve figured out one thing, and that is I want to set up as if it were a job. Times of the week that I paint.

Liz also notes she received training from a foundation that helps children with terminal or severe diseases. She will help the children and their families cope with their situation. She plans to start work once she receives the “go ahead” from the foundation.

Alex hoped to receive federal grant money to develop his land as a prairie restoration project and to grow hardwood trees in the long term. However, he recently heard they “were not in fact approved for the grant.” His son and he built a pond dock and are starting to “build a cabin in the woods above the pond.” When discussing the possibility of growing quality hardwood trees, he states, “I hope in my lifetime I can make it happen. Get started on it.”

Mac wishes to “reduce the amount of [his] life energy that’s going to physical work and increase the amount of life energy that’s going toward more intellectual or

more people-oriented interactions.” He explains his vision for a future educational project:

What you’re talking about is that that doesn’t exist, you know? It’s not that I need to teach courses; it’s that people somehow need to let people know what they’re trying to learn and then somebody shows up that can do it. Just enough structure to let it happen.

John plans to make his trip to Chappell, Nebraska to view the artwork of Aaron Pyle, the student of Thomas Hart Benton. John owns two of Pyle’s paintings and looks forward to visiting Chappell’s library and the 17 paintings by Pyle. One might expect to see a story soon about Aaron Pyle’s artwork in John’s promotional catalog.

True to her commitment to community service, Gertrude talks about her next venture, “That’s an interesting question. I think next is, well, there’s a next on the horizon, but I can’t talk about it. I am being considered for a position on a committee. It’s volunteer but it’s a very nice committee.”

Bess looks forward to extensive travel in China this October. She will travel with a “friend from California” who will be making her fourth trip. Ethel thinks about her future and her heritage of exploration and education. She states, “Exploration is lifelong learning It’s the launching into something new.”

Discussion

This case study was conducted in a naturalistic setting in which participants interacted with the inquirer on several occasions, and where conversation flowed from a few very general questions by the inquirer, and then developed according to the participants’ ideas. As the inquirer, my role included using my tacit knowledge to

exchange ideas with the participants and helping to create a dynamic environment in conjunction with participants. That environment, if successful, facilitates an exploration of lifelong learning from the participants' perspectives (Lincoln & Guba, 1985).

The results of this study emerged as the study took place and as the participants discussed ideas about learning. In essence, the results swelled up from the information provided the participants. An emerging and inductive design occurred in much the same way. The case study's most dynamic qualities became apparent as the categories of thought and the four general themes emerged, not as a preplanned scheme to be developed through the study.

Any working hypothesis about this naturalistic inquiry would, by nature of the emergent research design, relate only to the context of this group of 12 participants. It can only be verified by the participants as truthful or real. In fact, no other research could reproduce this case study. It happens in real time and yields a case study that may then be compared to other studies for similarity or dissimilarity. Though this may be true, the insights that result by participating in this research can help all of the participants, including the inquirer, to understand lifelong learning in a way that would have been impossible prior to participation.

The descriptions of participants' ideas, processes, expectations, and attitudes hopefully reflect the multiple realities and biases that exist within the participants' perspectives. Further, these perspectives, as written in the study, represent an idiographic interpretation—meaning they are particular to this case study—and cannot be generalized with any assurance to broader groups or individuals (Lincoln & Guba, 1985).

In a naturalistic study, the inquirer should be tentative about making any application or drawing any conclusions beyond understanding and appreciating the highly contextualized information found in the case (Lincoln & Guba, 1985). Some naturalistic research might address a problem or an issue. However, this research followed a pure naturalistic concept of letting participants indicate which issues concerned them, rather than identifying a problem in the outset (Lincoln & Guba, 1985).

Given this approach, I learned that each of 12 participants shared a complex, sophisticated, and unique perspective about their lifelong journey with learning. I learned how, in some instances, learners shared commonalities, such as the belief they are curious people, and the importance of reading. However, I also learned that each participant's unique approach to lifelong learning dominated this study. That is, each learner integrates lifelong learning into his or her life through a complex matrix of actions, beliefs, attitudes, goals, and personal history. This self-integrating process allows the individual to be just that—a unique individual who has become, through a process of learning, a lifelong learner.

Chapter 6-Summary and Conclusions

Summary of Inquiry

This inquiry sought to provide an in-depth portrayal of the reality of lifelong learning from the perspectives generated by 12 learners. Specifically, this inquiry sought answers from each of the 12 lifelong learners to the following research question:

What is the rich, lived, lifelong learning experience from the individual's perspective?

To find answers to the research question, a variety of general questions was asked to each participant. Below are three questions used in the first interview with participants:

What is it like being a lifelong learner?

What is your role in lifelong learning?

What are the issues that I need to understand about lifelong learning in your life?

This line of questioning allowed ample opportunity for the participant to form and refine answers, to lead discussion, and to define his/her experience with lifelong learning in a way that made the most sense to him/her. As the conversation between the inquirer and the participant proceeded, the inquirer pursued ideas and concepts generated by the participant to reveal the participant's deepest thoughts about lifelong learning. Thus, the participant and the inquirer worked together as a team to probe the meaning of lifelong learning for the participant.

It was the inquirer's goal to pursue questions until they were answered by a participant to the satisfaction of both the participant and the inquirer. The inquirer used the same basic research question with each of the 12 participants in the diverse sample. Second and third interviews between the inquirer and each participant focused on specific

questions resulting from the issues generated by the participant during the first round of interviews. This allowed for clarification in any given area of concern and extension of previously generated ideas.

To accomplish this type of in-depth investigation of 12 individuals' thoughts, the inquirer engaged in persistent observation (Lincoln & Guba, 1985), returning to each participant after the first interview at least two more times. The inquirer also followed up with each participant by using mini-member checks (i.e., the inquirer checked with the participants during interviews to make sure he understood what they meant and made corrections to handwritten notes and/or took appropriate handwritten notes). The inquirer also used a grand member check (i.e., a meeting of all available participants in which participants reviewed case study drafts and provided the inquirer with revision suggestions). These member checks were done to assure the resulting descriptions and portrayals of each participant's thoughts made sense to each participant and to assure those portrayals accurately depicted each participant's perspective about lifelong learning.

This inquiry also sought to fill a void in the literature about lifelong learning. It appears no literature approaches lifelong learning from a purely naturalistic perspective that asks: What is the rich, lived, lifelong learning experience from the individual's perspective?

By allowing this question to guide the research, we (the inquirer and participant) walked down any path the participant wished to go. We explored any back road, any winding brook, or any unexpected twist in the trail of a participant's lived experience with lifelong learning. When a participant expressed interest in the issue of her

involvement in a lifelong learning program, the inquirer followed and documented the concern. When a participant expressed interested in high achievement, self-performance, and accomplishment, the inquirer went along, understanding the participant, and checking with the her/him to be sure the research writing and documentation made sense in context with her/his life.

Related studies by Martin (1995) and Scott (2002) provided limited information that flowed from their research designs. Martin's inquiry included qualitative and quantitative methods and utilized a priori questions limited to the concepts of loyalty of participants to higher education institutions. Scott used a constructivist, grounded theory approach, and created a priori questions related to self-efficacy and perseverance in lifelong learners over 50.

Because Martin's (1995) and Scott's (2002) studies include a naturalistic component and a lifelong learning focus, they are related to this study. However, neither of these studies left the gate open to allow participants access to explore the pasture of lifelong learning according to their interests. Their focus corralled the participant to assure that she/he addressed a previously determined topic to the satisfaction of the inquirer. Neither method—corralling the participant, nor leaving the gate open—represents a superior research approach. Each method executes the goals of its respective research design.

Inquirer's Construction of Key Categories

This naturalistic inquiry attempted to create an in-depth portrayal of participants' accumulated thoughts on lifelong learning. To do this, the ideas exposed through the interviews were documented, dissected, and grouped through processes of unitizing and

categorizing (Lincoln & Guba, 1985). These processes resulted in the discovery of 16 key categories of thought. Each of these categories represents a parent node (the highest level category in the outline) and each parent node heads a group of other subcategory nodes (child, grandchild, and great-grandchild nodes) in a categorical outline of more than 270 total nodes (See Appendix A). None of the nodes existed or were predetermined prior to the interviews; instead they are grounded in interview content and grew from the interviews through analysis and management using qualitative data management and analysis software.

This rich and complex node category scheme represented a framework that archived the compiled thoughts of the participants. Reviewing the key categories helped the inquirer to think about emerging broader research themes and to make conclusions. Thus, the inquirer served a fundamental role as analyzer of results and built a framework from which to start addressing larger themes. The inquirer then created four broad themes to facilitate discussion and allow for the comparison of participants' perspectives. The next section provides additional information about the inquirer's critical role in determining research activities and results.

Role of the Inquirer

The inquirer facilitated the naturalistic research process as a human instrument. A human instrument allows for value assessment, reading of emotion, spontaneous tracking of new ideas, and the ability to discern significance based on the quality of idea exchange encountered in the study. The requirement for adaptability to the variety of realities in a naturalistic study uniquely qualifies a human to serve as the central research instrument. Lincoln & Guba (1985) believed:

It would be virtually impossible to devise a priori a nonhuman instrument with sufficient adaptability to encompass and adjust to the variety of realities that will be encountered; because of the understanding that all instruments interact with respondents and objects but that only the human instrument is capable of grasping and evaluating the meaning of that different interaction (p. 39)

Adapting to the participants in this study required the inquirer to hear complex stories and to attempt making sense of them, always in a lifelong learning context. The following example, taken verbatim from an interview within the study, illustrates the inquirer's efforts to understand a participant's view of mentoring and learning and then to respond in a way that leads the conversation forward into the territory of learning (I is inquirer; P is participant):

P: I'm a very micro, I mean I'm a microcosm kind of person. I am not a big vision person. My big vision consists of understanding that the goal of the store was to be profitable, make money and provide service.

I: Cut and dried vision?

P: Yes, cut and dried! The way we achieved it was partly a result of my micro-managing a fiscal business side of that business. I have better number skills than I have people skills. My people skills tend to suck in fact. And I think the reason for that, you know the old Biblical story of the pharaohs and the Jews in slavery? How, you know anything about this stuff, there's an old Biblical story where one day pharaoh went out and he worked with the slaves, and they all [said], "Wow he's working with us." And they all worked hard and they made X number of bricks. And at the end of the day he said, "OK, you made 477 bricks today.

Tomorrow you have to [make] 480!” So, it was like rah, ray, go, go. Now we have the bench mark. Tomorrow it is 480. Then they made 480. Now the next day it is 483.

My problem, where I got into problems with people, were interpersonal because I took whatever the norm on a given day was as the new standards to be superceded the following day. I mean I never accepted, there was never even keel. I don't believe in an even keel. Even keel is going backwards in my world. And so, I always was trying to figure out, OK, now he's learned how to handle the warranty stuff that day. Now how you going to do it, get returns more quickly or more efficiently? Or let fewer things fall through the crack? What kind of document would you need to make your discussions with this supplier simpler so he didn't argue with you about the blah, blah, blah.

Whatever it was became the norm so I said, OK now let's tweak it again. Now let's tweak it again. And that's in a way . . . always trying to learn a new way to do what we did yesterday either more efficiently or profitable.

I: OK, so I am getting a vision on this with you. You're a very pragmatic kind of learner and perhaps mentor, too. What I am wondering . . . is your learning style, the way you learn yourself, the same as your mentoring style? I mean do you, when you learn for yourself, do you keep ratcheting up what you are expecting yourself to learn? How you deal with larger and larger capacity? I mean you are expecting your workers to increase their effectiveness and their efficiency. They had to learn that from you. You were mentoring them. I am just wondering if there

is a consistency throughout your expectations for yourself and your expectations for [others]?

P: I think that there is. I think another part of my personality, I think that my answer to that is that I have had the good fortune of having in my areas of interest either mentors or role models, or prototypes for what I thought the end goal should be. I take now in wood working (participant launches discussion about how he learns from his wood working mentor)

In the above example, the participant was able to explore his ideas about pushing the envelope of efficiency and productivity in his store. As the inquirer learned about the participant's thoughts about the scope of the participant's vision, he simply asks if the vision is "cut and dried." This allows the participant to expound upon the idea by telling a parable-type story about the pharaoh and workers. The inquirer then informs the participant of new insights into the participant's concepts of learning and asks how this new information relates to the participant's approach to learning. The participant responds by introducing examples of how he interacts with his favorite mentors. This heuristic approach to interviewing by the inquirer facilitates exploration while maintaining proximity to the ideas found in the basic research question.

By adapting to leads by the participant, the inquirer allowed a very open discussion environment. Yet, this required the inquirer to constantly assess whether or not the interview meandered too far from the purpose of the interview. In the above example, the participant may have wanted to talk more about the business aspect of his store, but the inquirer maintained focus on learning within the context of the participant's activities within the store.

The inquirer helped reveal and documented each participant's view of important issues, influences, benefits, and other aspects of lifelong learning. During the process, the inquirer created 16 key categories by grouping like units of thought offered by the participants. For example, several participants mentioned how they benefited from learning and cited an example. The inquirer created a parent node called "Benefits of Lifelong Learning" (See Appendix A, category 10). Then the inquirer created child nodes to indicate the specific benefits participants cited. Those included categories such as "Meet New People," "Learn From Others," and "It's Fun" (See Appendix A, categories 10.1 through 10.11).

The inquirer also decided the research should be addressed through four broad themes containing the most dynamic information offered by participants. Creating the final four themes relied completely on the inquirer's qualitative and subjective judgment to choose premises that best reflected the research. These themes evolved through each phase of the study. The themes emerging from Phase I included uniqueness and variety, reading, general curiosity, spiritual awakening and significant life events, and communication patterns and expectations in the classroom.

These themes related to the areas of interviews in which participants exhibited high energy and dynamic discussion. The inquirer further shaped the themes at the end of Phase II. The previous theme of communication patterns and expectations in the classroom did not continue to be of particular interest to participants during Phase II. The inquirer dropped that theme and determined four themes resulting from Phase II including curiosity and obsession, spiritual awakening and significant life events, reading, and uniqueness and variety. The inquirer refined the theme titles and used the

themes in the preliminary case study to provide and tell the rich stories of participants. The discussion below summarizes the themes.

Summary of Broad Themes

The final four broad themes chosen by the inquirer included passionate and obsessive curiosity, significant life events and spiritual awakening, the importance of reading, and uniqueness and variety. To some extent, these themes were chosen as a way to manage a discussion of the research. That is, using 16 key categories or the more than 270 nodes would have made the task of discussion much more complex compared to using four broader themes. The inquirer also determined that the four themes, taken together, represent the most significant and dynamic information provided by participants.

The first three themes—passionate and obsessive curiosity, significant life events and spiritual awakening, and the importance of reading—illustrate commonalities among participants. Ten of 12 participants explained they are curious by nature. Nine of the 12 participants expounded upon a significant event in their lives that affected their learning. Each learner was affected by the passion for or frustration with reading. Ten participants described their abilities to read, and three participants discussed lack of ability to read at their desired level.

The fourth theme—uniqueness and variety—did not limit discussion to a specific topic as did the previous three themes. It allowed extensive comparison of the participants' thoughts across key categories. The participants offered a wide range of ideas about the issues, roles, learning processes, types of learning activities, influences, benefits, favorite study topics, and motivations they experience related to lifelong

learning. They reflected on themselves by discussing expectations for the future and concepts of self-determination. They provided further reflections about themselves, their self-esteem, and their personal growth. Although participants covered a wide range of topics, due to the open and constructive nature of this research, this study, like any study, worked within its limitations. The next section discusses those limits.

Limitations of this study

This study attempted to learn about the rich, lived experiences of lifelong learners based on their unique perspectives. It sought to facilitate the participants' exploration of lifelong learning based on the contexts provided by the lifelong learners. No area or areas within lifelong learning were specified or focused upon by the inquirer prior to exposure to participants, other than a desire to understand their lifelong learning experiences. Given the unique contributions of each participant and narrowly focused sample of participants, this research was not designed to create generalizable results (Lincoln & Guba, 1985). No conclusions may be made about gender differences, racial or ethnic background differences, or age differences, as these relate to lifelong learning.

Further, the research results do not represent the complete thoughts of the participants. The resource of time represents the primary limitation to continuously updating, changing, and increasing the body of knowledge that could result from interviewing and analyzing the same 12 participants. After several member checkpoints, the research was ended so summarizing and analysis could begin. Otherwise, the 12 participants, who are not static in their lived experiences involving lifelong learning, would continue to contribute new outcomes. They continue to experience new learning and teaching situations, create new opportunities, and experience new frustrations. Thus,

this study offers insights into the perspectives of a particular group of people within a particular range of time, while recognizing those perspectives will undoubtedly continue to change.

The reader may use this research to gain insight into the case, empathize with participants' stories, and relate information and insights gained from this study to his/her knowledge of other lifelong learners. By doing this, the human (the reader) again acts as an instrument by comparing facts, stories, and concepts, and then judging whether or not similarities between the study's participants and those known by the reader may exist and in what way linkages may occur.

This research purposely limited involvement to learners over 50 years of age to adhere to a definition of lifelong learning by the inquirer. This assured the inquirer that the participants went beyond the "typical" learning path of P-12 education and the attainment of credentials in higher education for career advancement. It may be expected that people in the 5-through-late-20s age range undergo typical educational programs. This study purposefully selected participants beyond the "normal" range of age for traditional higher education attainment, even at graduate levels.

Although the study attempted to limit involvement to learners who participate in lifelong learning for enrichment purposes, the blurred distinction between instrumental and enrichment learning became obvious. For example, Sam Samudio maintains a consulting career and participates widely in community groups and service committees to remain connected with the community. This would be considered an instrumental use of learning for the purpose of making new connections so he can continue to earn income. However, Sam clarifies in his interview that he learns through these community service

groups in a way that enriches him and that his learning approach does not distinguish between instrumental purposes related to career and enrichment purposes related to pure learning. The indistinguishable qualities of enrichment learning and instrumental learning were addressed in chapter 2 (Manheimer, Snodgrass & Moskow-McKenzie, 1995) and remain consistent with this study's findings.

Study Findings

This study revealed that each participant integrates lifelong learning into his or her life through a complex blend of actions, beliefs, processes, preferences, attitudes, goals, and personal history. This self-integrating process allows an individual to be just that—a unique individual who has become, through a process of learning, a lifelong learner. The discussion below illustrates how each participant shared unique aspects of being a lifelong learner.

Self-Integration of Lifelong Learning in Participants

Through discussing the four broad themes, this research illustrated the complexity in each participant's life relative to lifelong learning. Each of the 12 participants experienced learning in a different way. At the same time, the 12 participants shared basic aspects of lifelong learning, as indicated by the fact that 16 key categories accommodated the accumulated participants' ideas. Table 4 illustrates each lifelong learner's characteristics. A brief description of the individual follows each descriptor.

Table 4

Participant Traits

Participant	Descriptor: Description
Chester	Seeker: Driven by curiosity. Names many areas of interest
Burnett	including alternative fuels, Native-American culture, and finances. Very active learner within groups.
John Hurt	Academic entrepreneur: Integrates learning with business through inclusion of literature in promotional pieces for store.
Bess Tucker	New individualist: Enjoys her new life as a single adult. Enjoys learning with social involvement. Travels widely to learn.
Alex Miller	Pragmatist: Learns to improve, especially in the area of skill attainment. This “doer” observes others and learns from them.
Mac Morganfield	Holistic thinker: Seeks a learning environment in which the learner and teacher frequently exchange roles. Believes the world needs learning to be a better place.
James Reed	Creative compromiser: Learns through creating art. Compromises his artistic expression for professional career in which he helps others learn.
Mary Reed	Nonconforming introvert: Interested in a broad range of topics but always returns to her world of art. Introverted yet enjoys lifelong learning classes.

Ethel	Detailed internationalist: Family heritage of international travel.
Waters	Journeyed to America to learn library systems. Enjoys retaining facts and accessing information.

Liz Douglas	Restless idealist: Thinks idealistically about circularity in the world. Always on verge of discovering who she is. Studies any topic to aid in self-discovery process.
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Beulah	Academic learner: Likes structure provided by academe. Attained
Thomas	graduate degree later in life. Works as a docent and audits classes. Studies in lifelong learning institute.

Gertrude	Community leader: Focuses learning on serving community and
Ranney	applying learning in her service role in community. Enjoys infrequent enrichment classes.

Sam	Involved mentor: Creates continuous opportunities through
Samudio	consulting, community service, and mentoring underrepresented people. Learning and life are inseparable.

For decades, learning research has used categorical descriptors and illustrated unique learner traits. Gardner's (1983, 1993, & 2006) well-known research indicated unique qualities of individual competence through multiple intelligences (MI). The MI classification system theorized that dominant types of human intelligences influence the individual's learning processes. The MI classification includes nine intelligences: verbal-linguistic, logical-mathematical, musical-rhythmic, bodily-kinesthetic, visual-spatial, interpersonal, intrapersonal, naturalist, and existential (Gardner, 2006).

Gardner's (1983, 1993, 2006) intelligences could be applied to this study's learners by associating each learner with what might be the closest fit from the Gardner classifications. James, the artist, undoubtedly focuses his learning through the visual-spatial intelligence, whereas Liz often taps into the existential realm of intelligence by looking for deeper meaning in life. Alex, the "doer," may use the bodily-kinesthetic process and Mary, the introvert, seems naturally inclined to use intrapersonal thought. Mac's passion for working with the land and his interest in ecological balance associate him with the naturalist intelligence, and Chester and Ethel could possess the verbal-linguistic intelligence, given their comfort with speech and their eloquent language abilities.

Table 5 illustrates Gardner's nine types of learning intelligences and possible correlations to participants.

Table 5

Gardner's multiple intelligences correlated with seven participants

MI Traits	Participants
Verbal-linguistic	Chester Burnett, Ethel Waters
Logical-mathematical	
Bodily-kinesthetic	Alex Miller
Musical-rhythmic	
Visual-spatial	James Reed
Interpersonal	
Intrapersonal	Mary Reed
Naturalist	Mac Morganfield
Existential	Liz Douglas

The meaning of the word “intelligence,” however, can be confusing. In 2003, Gardner explained three distinct uses of the term:

A property of all human beings (All of us possess these eight or nine intelligences), a dimension of which human beings differ (No two people, not even identical twins, possess exactly the same profile of intelligences), and the way in which one carries out a task in virtue of one's goals (Joe may have a lot of musical intelligence but his interpretation of that piece made little sense to us).

(p. 8)

These three definitions may help provide insights into the 12 participants in this study, especially the second definition, which points to the unique profile of any individual. However, the single concept of intelligence probably does not explain or define the uniqueness of each participant and represents a research area that extends beyond the scope of this study.

Gardner noted in 2003 a number of misinterpretations of his MI theory, including the “confusion of intelligences with learning styles and with the confounding of human intelligence with a societal domain (e.g., musical intelligence being equated with mastery of certain musical genre or role)” (p. 8). To avoid such confusion, it should be noted that the descriptors in Table 4 do not indicate any type of intelligence but simply suggest a learning approach unique to the individual and organic to this study. Gardner’s description in Table 5 does not suggest a formalized learning style, as do some stylistic categories developed through learning styles research (Gregorc, 1982, 1985). Further, the categories of multiple intelligence may not apply to a research participant simply because the participant exercises interest in an area that somehow correlates with a multiple intelligence category. For example, Table 5 associates Mac Morganfield with the naturalist intelligence. A trained psychologist may debate whether or not Mac exhibits more traits of a naturalist intelligence or another category, such as verbal-linguistic.

Research in leaning styles helps explain how people learn according to the style with which they feel most comfortable (Gregorc, 1982). Learning styles are not necessarily related to intelligence, mental ability, or actual learning performance. Gregorc (1985) noted that learning styles represent “behaviors, characteristics, and mannerisms which are symptoms of mental qualities used for gathering data from the environment”

(p. 179). His concepts of the behaviors, characteristics, and mannerisms as “symptoms” implies a correlation (not a sign of illness) linking these traits to mental qualities. These mental qualities, however, remain undefined by Gregorc.

Gregorc (1982) provided four basic categories of learning styles: Concrete-sequential, concrete-random, abstract-sequential, and abstract-random. Each of these categories explains how humans learn best. An individual may be dominant in one or two of Gregorc’s styles, but all of the styles may also be used by an individual. The inquirer did not use the Gregorc Style Delineator to measure learning styles and therefore cannot draw conclusions about where each participant fits on Gregorc’s learning style continuum. However, in some cases, participants seem aligned with the descriptions associated with Gregorc’s styles. Table 6 illustrates Gregorc’s dominant styles.

Table 6

Gregorc's Styles

Concrete sequential learners	Abstract sequential learners
prefer sequential instruction, hands-on activities, haptic (tactile) methods and real-life examples.	prefer highly verbal, logical, and analytical approach based on intellect; solitude, visual and organized instructional materials; and they are skeptical and do not pick up subtle nonverbal cues.
Concrete random learners	Abstract random learners
prefer trial-and-error discovery, intuitive breakthroughs, stimulating environments, competitiveness, impulsiveness, problem solving, and lack of structure.	focus on relationships and emotions, visual instructions, group discussion and time for reflection.

In this study, Alex may align most closely with concrete-sequential, because he prefers direct, hands-on activities, haptic methods, and real-life examples. Sam appears to fit with the concrete-random style, because of his trial-and-error approach, ability to thrive in a stimulus-rich environment, passion for problem solving, and intuitive insights. James could be the participant closest to the abstract-sequential, because of his preference for solitude, his skepticism, and his appreciation for visual instruction. The abstract-random indicates the emotional and imaginative qualities within a person who prefers an active, interesting, and informal learning environment. Liz may fit in this category of

learning style, because she seems driven by relationships and emotion, and she often evaluates her personal experiences. The other research participants seem to fit in multiple categories and without further testing any categorization would represent little more than wild guesses.

Gregorc's four categories attempt to provide a basic scheme for understanding universal traits based on learning styles. This study, however, does not attempt to generalize learning approaches by creating categories of learners that could be applied to a wider group of learners. Instead, this study simply uses descriptors in Table 4 that organically associate each individual with a unique approach to learning based on information they provided during interviews.

Inside-Outside Theory of Lifelong Learning Integration

The descriptions in Table 4 emphasize the participant's unique relationship with learning compared to the other participants in the study. Regardless of the unique lifelong learning traits, other similarities exist between any two or more lifelong learners. This dichotomy, of differences and similarities in how lifelong learners integrate learning in their life, could be referred to as the Inside-Outside Theory of Lifelong Learning Integration for this sample of participants. The inside component indicates that, inside of certain parameters, learners are similar. The outside component addresses how, outside of those inside parameters, the learners contrast with each other because of differences.

Numerous examples help clarify how the participants' approach to learning illustrates the Inside-Outside Theory of Lifelong Learning Integration. In some instances, Chester Burnett integrates learning through an approach that does not intersect with Alex Miller's approach. Chester is an avid reader, acknowledges spiritual influences on

decisions relating to learning, is satisfied with the learning process, and participates in learning activities in a lifelong learning institute. Alex Miller struggles with reading, is the “least spiritual” person, and remains unsatisfied with his learning process, especially relative to reading. Alex does not regularly participate in lifelong learning institute classes.

Although these two participants experience many differences, they both claim to be satisfied with how and what they have learned. They both claim to be very curious people, and have experienced significant events in their lives that caused them to adjust what they learn—Chester through his loss of a real estate development and divorce, and Alex through selling his store. Both Alex and Chester like to focus learning on financial matters, although George focuses more on stock market investments, while Alex focuses on local real estate investments. These similarities indicate the “inside” aspect for these two, the mutual types of processes or activities they experience. The figure on the next page illustrates the Inside-Outside Theory of Lifelong Learning Integration.

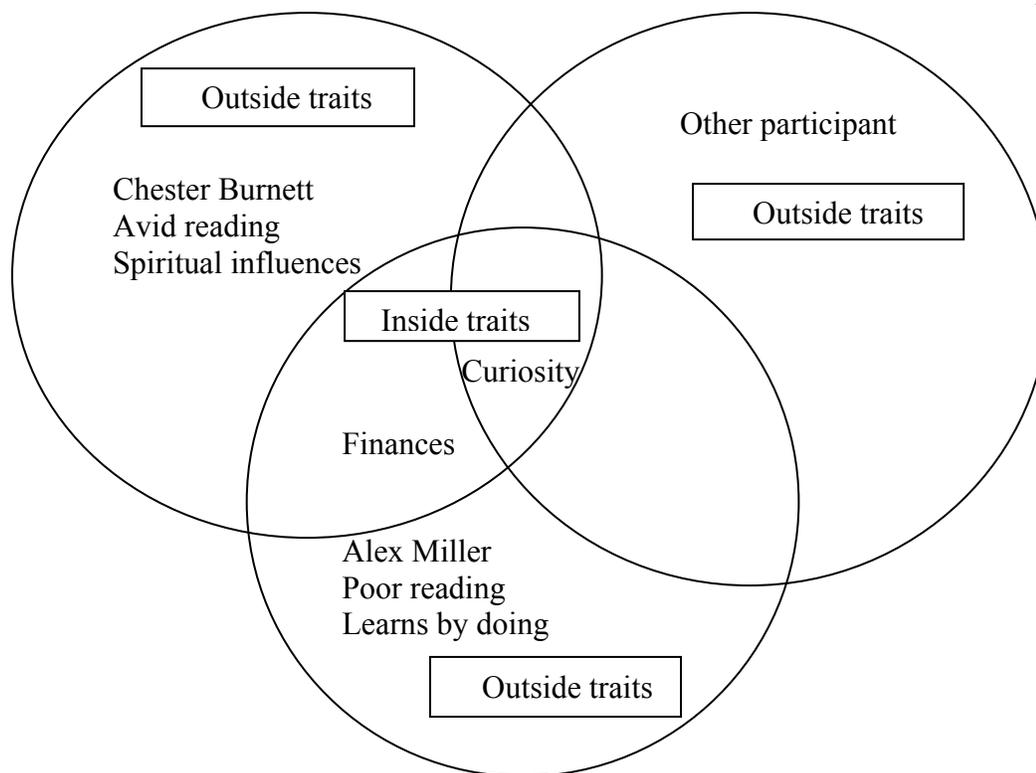


Figure 2. Conceptual model of Inside-Outside Theory of Lifelong Learning Integration by M. Hunt, 2006.

The Inside-Outside Theory for this group of learners posits the following: While there are similarities in learning processes and preferences among the study's learners (i.e., inside traits), there are also differences distinguishing learning processes and preferences for each learner (i.e., outside traits). This study-specific theory helps facilitate recognizing inside and outside traits among any and all of the learners.

Gregorc's (1982) concepts, that each person possesses both universal qualities common to others as well as attributes unique to the individual, correlate with the proposed Inside-Outside Theory. The inside aspect of the theory correlates with Gregorc's concept of the universal, and the outside component correlates with Gregorc's concept of individual uniqueness. A key difference between Gregorc's concepts and the

underlying premise of the proposed Inside-Outside theory rests in Gregorc's concepts of the universal nature of four learning styles versus this study's lack of potential for generalizing or creating any universal base common to all lifelong learners. Instead, this study allows for common approaches to learning between one learner and the next, but does not propose that commonness exists among all learners, even across four broad learning styles, as does Gregorc's system.

Implications

The considerable variety of learning styles, processes, and preferences found within this study lead to suggestions for developing a lifelong learning institute and creating educational programming for a particular group of lifelong learners. The lack of potential to generalize information from this study may initially be perceived as a hindrance to creating educational opportunities for lifelong learners. Preferences for learning found in this study, even if they are common to many or most participants, cannot be applied to the development of a state or national curriculum for lifelong learners with any confidence that the application will satisfy a general population.

Naturalistic research attempts to understand a particular set of perspectives but does not generalize from those perspectives to a much broader theory that could be applied to a wider population. Statistical significance of any quality of this study has not been measured, nor does this study provide any guaranteed standards. Instead, the reader must consider the specifics of this study and decide whether or not any outcomes could be transferred to another specific situation with which they are familiar. Lincoln & Guba (1985) emphasized the key concept of transferability in naturalistic research.

Transferability relies on the judgment of an individual who is in a position to

make decisions about whether or not outcomes from a study can be applied to a particular situation. To apply lessons learned from this study, the reader would have to be aware of the traits of the learners with which he/she is involved.

Increasing awareness of learner traits. This study could prove to be important for any lifelong learning institute or curriculum development because of its learner-centered approach. By discovering learners' passionate and varied interests, a customized curriculum could be developed that will have more potential for satisfying local learners. With knowledge of specific learner traits, planners would be better equipped to make good choices about educational programming.

This research helped identify how 12 people integrated learning into their lives. By observing the self-integration of local learners this study discovered a wealth of information beyond what could have been gleaned from a simple survey or a one-time observation or short interview. The participants revealed 12 learning processes, 17 types of favored learning activities, 18 roles played, and a host of other information including influences, expectations, and issues related to learning (See categorical outline in Appendix A). This level of scrutiny helps anyone involved in creating quality lifelong learning opportunities to know and deeply understand lifelong learners. It helps inform a multitude of decisions about how best to serve participants. By increasing awareness of learner traits in any situation, administrators, instructors, or other planners involved with lifelong learning will have more confidence about serving lifelong learners and meeting their educational needs and personal interests.

Program creation. The scope of this study may be considered narrow in respect to the number of people studied, but quite deep relating to the careful tracking of

participants' perspectives. A detailed list of favorite topics and learning activities revealed by this small number of people could inform a curriculum designer or committee about potentially appealing programming for these people. For example, if a group including James Reed, Alex Miller, and John Hurt populated a class on Irish literature, the instructor should use examples beyond dense text so that these slower readers could profit to a greater degree. The instructor may want to consider visually stimulating media with pictures or illustrations. Perhaps having a unique or historical copy of a book to pass around would heighten the experience for those who would profit from feeling the binding and smelling the musty odor of the aging paper. Telling stories about authors while showing their photographs could help texts come to life. Allowing more time for students to read the texts used in class may also help enrich their experience.

A range of courses and topics should be considered when developing a course catalog to serve learners with a variety of learning traits. To satisfy this study's 12 participants, a curriculum developer should select programming from the fields of geography, literature, history, music, science, culture, architecture, political science, and the arts, since they mentioned these were their favorites. Learning through activities in mechanical or natural world settings may also help Chester Burnett, Alex Miller, Mac Morganfield, and Mary Reed to become involved because of their particular interest. Finding ways to allow this study's participants to build community; and mentor, influence, and lead others would stimulate Chester Burnett, Mac Morganfield, Liz Douglas, Gertrude Rainey, and Sam Samudio. Providing dynamic lectures would undoubtedly attract John Hurt, Bess Tucker, and James and Mary Reed. These few

examples help illustrate the micro-level planning that could lead to curricular success in a lifelong learning institute. If key individuals wielding influence enthusiastically embrace programming because it has been designed with them in mind, others influenced by those key individuals may also become enthusiastic.

A director's perspective. I learned many things about learners and lifelong learning throughout this research process. Because I direct a lifelong learning institute, the lessons learned particularly excite me and help me plan future educational programs. More than helping with curriculum programming, however, this study greatly enriched my understanding of how 12 unique and outstanding people see the world. Thus, I gained from this experience a profound new understanding of the perspectives of others who love learning, and in the process, increased my tacit knowledge about the lifelong learners and their learning experiences.

Lincoln and Guba (1985), referring to tacit knowledge, stated, "It is not possible to describe or explain everything that one 'knows' in language form; some things must be experienced to be understood" (p. 195). Though Lincoln and Guba (1985) are correct, explaining in a complete sense what I have learned is difficult or impossible to express in words, I will try to offer a few additional thoughts. Now, when I see an interaction between two older students, a person studying, or a classroom full of older students, I will not see it in the same way I saw it prior to this research. I have been enriched by the lives of those whom I carefully studied and who shared their life stories with me. I learned how they learned. Liz Douglas would say that learning, like life, is a circle, and you return to the origin with new insight. According to Liz, I may be returning to a point where I have been all along. I would take a slightly different approach and say I have

arrived at a similar point but at a higher level of understanding. So maybe learning is more of a spiral up and away from a starting point but always reflecting upon the previous turn of the circle.

I started the case study by speculating how the research might work, hoping that my experience with Chester Burnett proved fruitful. One great lesson from this study is that I will assume a little less now about older learners. Chester proved to me within minutes of the first interview that an 85-year-old man can be sensitive, start men's groups, study alternative fuels, and work professionally as a social worker after running a successful bill collecting business. Insights such as this help us understand people for what they are, not for what their age category, gender, or social status might suggest according to stereotypes.

I leave this study with many new insights and encourage other directors, planners, curriculum designers, and educators to consider learning about adult students in greater depth to better serve their educational needs. And while this type of study may be much more involved than time and money allow, I suggest trying in any way possible to gain tacit and overt knowledge about local learners' lives and situations. This could be accomplished through surveys, focus groups, inviting them onto decision-making committees, engaging in conversation with leading students, seeking out underrepresented students to learn about their specific learning interests and perspectives about the institute or program, and especially taking time to attend class with adult learners to see how they respond to instructors and each other. I have also greatly profited by helping transport learners to a class, whether in my car or as a host on a bus. All of

these tools and approaches provide opportunities to peer into the minds of lifelong learners, to gain tacit knowledge, and to become enriched through the learning process.

Recommendations for Future Research

This research provides a starting place for discussion about the many issues relevant to participants. It informs the reader about a wide variety of thoughts offered by a specific group of people with a depth of experience in lifelong learning. The project also led the inquirer, through the course of conducting the study, to consider four ideas for new research opportunities.

Sampling Differences

This research could be repeated with a different group of participants to understand how the range of outcomes illustrated by the nodes and broader themes in this research compare to any new results. Assuredly, differences would result, but other commonalities could emerge. Sampling differences could include a broader age range of participants, higher percentage of people of color among participants, participants with specific educational backgrounds, participants with a specific level or range of financial security, or otherwise limiting the sample according to any defined range of demographic variables. Sampling a broader age range of participants would increase sample diversity, but could require redefining the age range of lifelong learners participating in the study. This study focused on learners 50 years of age and older. Limiting a study to participants with specific educational background would create a less diverse sample. Lincoln and Guba (1985) encouraged increasing diversity of sample, yet this type of limit may expose interests of people within a local setting.

Exploration of Nodes

Future research could focus on the nodes developed in this research. Many of the 16 parent nodes (See Appendix A) include rich information that could be further investigated by conducting a limited naturalistic style of inquiry. For example, rather than leaving the content wide open for exploration by the participant, as did this study, a new project could limit inquiry by focusing only on node 16, view of self. This proposed limit could also include the three child nodes of self-expectations, self-determination, and self-reflection. To do this, the research design would limit the research question by asking: What is the self-view held by the lifelong learner relative to self-expectations, self-determination, and other self-reflections? Other nodes containing rich information that warrant more investigation include, node 3, learning throughout life; node 4, integration of life and learning; node 5, learning mode or process; node 7, role in learning; node 8, influences; node 9, major life changes; node 10, benefits of lifelong learning; node 14, issues; and node 16, motivations to learn.

Validating categories

Quantitative research could test the categorical outline of selected parent nodes for completeness and validity. Future research could ask if these 16 nodes entail a complete set of nodes for a broader or more representative sample of lifelong learners. These categories could be tested for validity of representation to gain confidence that the nodes indicate that which they are assumed to represent in this study. Similarly, other parent nodes and associated child, grandchild, and great-grandchild nodes could be tested as a family for coherence, completeness, and validity.

Focus on an Individual

A naturalistic inquiry focusing solely on one participant would allow gathering a greater depth of information and intensity of focus than was possible in this study of 12 participants. The new individually focused inquiry could more effectively utilize Geertz's (1973) concepts of thick description by allowing the participant to chain out any given concept until its complete exhaustion. The proposed study could follow the individual's suggested research path and include family members, mentors, or other local individuals who intersect with the main participant. Such study would provide a deep map of the individual's interests, concerns, and desires relating to lifelong learning. Outcomes of the proposed research could include a case study representing the story of the lifelong learner's life. The resulting deep map or learning profile could also be tested as a model for developing other inquiries or for sampling a broader group.

As lifelong learning becomes an increasingly important issue to all learners, the importance of lifelong learning research also increases. The above group of suggestions implies that an extension of this study will help move our accumulated knowledge about lifelong learning forward. A wide spectrum of research approaches, including naturalistic inquiry and conventional research tools, should be considered to grasp the broad range of ideas and issues found within the lifelong learning environment of our rapidly changing and learning world.

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Appendix A

Final Category Outline

1. Demographics

1.1 Age

1.2 Gender

1.2.1 Male

1.2.2 Female

1.3 Education

1.3.1 High School

1.3.2 Some College

1.3.3 Bachelor Degree

1.3.4 Graduate Degree

1.4 Career

1.4.1 Retired/Semi-Retired

1.4.1.1 Real Estate Broker

1.4.1.2 Social Worker

1.4.1.3 Secretary and/or Administrator

1.4.1.4 Bike Shop Owner

1.4.1.5 Wood Worker

1.4.1.6 Reference Librarian

1.4.1.7 Occupational Therapist

1.4.1.8 Univ Admin Asst/Govt Service/Serv Org Adm

1.4.1.9 Education Admin, Counseling & Personnel Services

1.4.2 Store Owner

1.4.3 Builder

1.4.4 Commercial Property Manager

1.4.5 Professor

1.5 Religious Background

2. Reading

2.1 Location

2.1.1 Bed

2.1.2 Couch

2.1.3 Upstairs

2.1.4 First Floor

2.1.5 On Walks w/ Taped Books

2.1.6 Audio Reader Service Location

2.1.7 Car

2.1.8 Outside

2.1.9 Library

2.1.10 While Traveling

2.2 Choices of Reading Materials

2.2.1 Books

2.2.1.1 Fiction

2.2.1.2 Biographies

2.2.1.3 Mysteries

2.2.1.4 On Tape

2.2.1.5 Cultural

2.2.1.6 Geography

2.2.1.7 Science

2.2.1.8 Self-Improvement

2.2.1.9 Historical Novels

2.2.2 Newspapers

2.2.3 Magazines

2.2.4 Other

3. Learning Throughout Life

3.1 General Curiosity

3.2 Early Memories

3.3 Positive Experiences

3.4 Negative Experiences

3.5 Long Term Interests

4. Integration of Life and Learning

4.1 Self-Identity as Learner

4.2 Transporting Learning to All Areas of Life

4.3 Justify Learning by Applying It

5. Learning Mode or Process

5.1 One Thing Leads to Another

5.2 Door Opens-Step Through

5.3 Talks to Others

5.4 Listens to Others

5.5 Obsession

5.5.1 Passionate About Something

5.5.2 To Become Expert

5.6 Physical Learner (Learn by Doing)

5.7 Visual Learner

5.8 Logical Learner

5.9 Refinement of Previous Abilities

5.10 Circular Journey

5.11 Comfort/Discomfort Stimulates Learning

5.12 Right Place—Right Time

6. Types of Learning Activities/Programs/Experiences

6.1 Lifelong Learning Classes

6.1.1 Osher LLL Institute

6.1.2 Audit University Classes

6.2 Travel

6.2.1 Domestic

6.2.2 International

6.2.3 Local/Regional

6.3 Fitness and Nutrition Classes

6.4 Computing

6.4.1 Internet

6.4.2 Property Management Program

6.4.3 Design Program

6.4.4 Problems w/ Computing

6.5 Skill-Based Learning

6.5.1 Woodworking Workshop

6.5.2 Mechanical Lessons

6.5.3 Land Stewardship

6.5.4 Photography

6.6 Meeting Groups

6.6.1 Men's Group

6.6.2 Women's Group

6.6.3 Mixed Gender Groups

6.6.4 Historic Theatre Group

6.6.5 Art Drawing or Painting

6.7 Chautauqua Tent

6.8 Special Lecture

6.9 Public Television

6.10 CSPAN/CNN

6.11 National Public Radio

6.12 Service Committees/Groups

6.13 Museum

6.14 Live Performance (Theatre, Music, Art)

6.15 Church Activities

6.16 Fellowship to Study

6.17 Workshops

7. Role

7.1 Mentor

7.2 Elder

7.3 Spectator

7.4 Participant

7.5 Listening

7.6 Community Builder

7.7 Learner/Student

7.8 Doer

7.9 Critic

7.10 Vision Provider

7.11 Micro Manager

7.12 Influencing Others

7.13 Top Expert

7.14 Teacher

7.15 Leader

7.16 Consumer

7.17 Self-Directed Learner

8. Influences

8.1 Family

8.1.1 Father

8.1.2 Mother

8.1.3 Children

8.1.4 Parents

8.1.5 Grandparents

8.1.6 Spouse

8.1.7 Grandchildren

8.2 Friends

8.3 Mentor

8.4 Teacher

9. Major Life Change

9.1 Spiritual Awakening

9.2 Retirement

9.3 Significant Event

9.4 Need for Major Change

10. Benefits of Lifelong Learning

10.1 Stimulating/Interesting

10.2 Meet New People

10.3 Self-Satisfaction

10.4 Gain Knowledge of Other Cultures

10.5 Learn From Others

10.6 Creates Structure for Learning

10.7 Helps You Stay Active

10.8 It's Fun

10.9 Rewarding

10.10 Learning Can Be Applied

10.11 Facilitated Growth in Life

11. Communication

11.1 With Instructors

11.1.1 Passive

11.1.2 Pushy and Persistent

11.1.3 Interactive

11.2 With Other Students

11.2.1 Positive

11.2.2 Introversion

11.2.3 Passive

11.2.4 Stimulate Them to Participate

11.2.5 Active

11.3 As a Participant

11.3.1 Active

11.3.2 Introvert

11.3.3 Passive

11.3.4 Opinionated and Withholding

12. Expectations

12.1 Of Instructor

12.1.1 Humorous

12.1.2 Ability to Convey Knowledge

12.1.3 Limit Foul Language

12.1.4 Limit Political Agenda

12.1.5 Controls Class

12.1.6 Prepared/Organized

12.1.7 Instructor Enjoys Teaching

12.1.8 Make Class Interesting

12.2 Of Other Students

12.2.1 No Expectations

12.2.2 Expectations

13. Favorite Topics to Study

13.1 Academic Topics

13.1.1 Geography (Places)

13.1.2 Literature

13.1.2.1 Biographies

13.1.2.2 Mysteries

13.1.2.3 See Reading Section for More Information

13.1.3 History

13.1.4 Music

13.1.5 Science

13.1.6 Culture

13.1.7 Architecture/Design

13.1.8 Political Science

13.1.9 Arts

13.2 Mechanical or Skill-Based Topics

13.2.1 Tractors

13.2.2 Wood Working

13.3 Natural World (Gardner's 8th)

13.3.1 Land Stewardship

13.3.2 Alternative Energy

13.3.3 Environmental Issues

13.4 Finances

13.5 Personal Growth

13.6 Grandchildren/Children

14. Issues

14.1 Finances

14.2 Mentoring

14.3 Helping People

14.4 Passing Knowledge to Younger Generations

14.5 Keeping Mind Agile

14.6 Having Fun/Pleasure

14.7 Social Involvement

14.7.1 Social Aspect Is Importance

14.7.2 Social Aspect Not Important

14.8 Remaining Active

14.9 Learning Now What Missed Earlier in Life

14.10 Lack of Social Connections

14.11 Aging

14.12 Focus Only on Money

14.13 Poor Reading Ability

14.14 Lack of Time for Learning Interests

14.15 Appear Like Intellectual/Snob

14.16 Applying Learning

14.17 Not Accomplishing Academic Goal

14.18 Seek Goodness

14.19 Lifelong Learning Classes

14.19.1 Negative Aspects

14.19.1.1 Negative People

14.19.1.2 LLL Classes w/ Homework Assignments

14.19.1.3 Logistical Problems with Attending Classes

14.19.2 Positive Aspects

14.19.2.1 No Exams in LLL Classes

14.19.2.2 No Grades in LLL Classes

14.19.2.3 No Stress in LLL Classes

14.19.2.4 Mature/Older People Share Class

14.19.2.5 Formal LLL Provides Structure

15. View of Self

15.1 Self-Expectations

15.1.1 Satisfied with Learning Process

15.1.2 Not Satisfied with Learning Process

15.1.3 Attaining Competency

15.1.4 Academic Goals

15.1.5 Daily Accomplishment

15.1.6 Self-Reliance

15.1.7 Life's Next Phase

15.1.7.1 Learning

15.1.7.2 Career

15.2 Self-Determination

15.3 Self-Reflection

15.3.1 Low Self-Esteem

15.3.2 Gaining Wisdom

15.3.3 Big Thinker

15.3.4 Small Thinker

15.3.5 Identify with Other Person

15.3.6 Personal Growth

15.3.7 Always Thinking

16. Motivation to Learn

16.1 Ego-Other People's Acknowledgement

16.2 Making Money from Learned Skills

16.3 Doing Good Work in a Bad/Sick World

16.4 Conveying Knowledge to Progeny/Others

16.5 Keep Life from Stagnating

16.6 Applying What's Learned

16.7 Curiosity

16.8 Having Fun

16.9 Getting Out of House

16.10 Becoming More Knowledgeable

16.11 Family Background

16.12 Learning Necessary for Survival

Appendix B

Sample of Personal Journal

5-20-06 After creating the 2nd Draft of the Categorical Outline I am very excited. The outline looks like a story waiting to happen. Early in this work I was concerned that I might not get legitimate data or enough data. It is clear that categories are starting to be strengthened between interviewees and that certain areas are getting filled out by children and grandchildren nodes (N6 terminology).

5-25-06 I find myself constantly thinking about the interviewees. Each of them has a distinct story to tell. I had a lengthy discussion with the peer reviewer. I explained how Chester Burnett seems to be on a lifelong question for higher aspirations. He really likes and prefers the mentoring role than the passive learner role. He acts like a 50 year old man even though he is 85.—my father's age. Bess Tucker emphasized her need to be independent and how much she enjoys her single life—where she discovers herself in ways that she couldn't when she was younger and married. John Hurt approaches learning very holistically as an entrepreneur and as an earthy, scholarly person. He integrates his interests in history, literature, and business into stories that he publishes on his web site in order to gain attention with customers, and ultimately sell footwear. Alex Miller is a micromanager and not a big thinker like John and Chester. He focuses on one thing at a time and claims to have no big vision even though he is grooming a beautiful 80 acre piece of land to have pastures, a pond, a cabin, and a beautiful home. He learns through action and experience in a practical setting such as his woodshop. He seeks

mentors who can show him practical ways to work with his hands. All of this connects to types of learners, their aspirations in life and their goals for learning as they age.

5-30-06 I interviewed Mac Morganfield yesterday. He really impressed me with his broad spectrum of interests as a builder, an environmentalist, a scholar and a gentleman. He wants to share his knowledge through a cyclical model of education (my interpretation of his ideas) in which he teaches and then learns, perhaps from and for the same people at the same time. He would like to contribute somehow to the community of learners in the home area. We have mutual friends and I would like to get together with him socially. He seems to be enjoying the academics of the interview and is committed to pursuing lifelong learning. I sense he is on the cusp of change in his life.

6-9-06 I drew a simple diagram of an idea I am having about the research. I call it inside/outside theory. This means that many of the concepts that seem to be shared by the participants are the “inside” ideas. These include self-determination, curiosity, and the enjoyment of learning without the pressure of grades. The “outside” concepts are the traits of learning that are specific to each participant and include things such as holistic thinking (Mac Morganfield), pragmatism (Alex Miller), non-confirming and introspection (Mary Reed) to name a few. These concepts are not really part of the node structure. However, the “inside” aspects relate mostly to the highest parent nodes in N6. The further away from the parent the node, the more likely it will be part of the “Outside” concept.

Appendix C

Sample of Daily Schedule of Activities

7-26-06 I called John Hurt, got his permission to be interviewed and taped by phone. I did the interview with him, took hand notes, transcribed and coded to N6. I transcribed John's interview tape. I interviewed Sam Samudio by phone, tape recorded the conversation, took hand notes, transcribed the tape and coded to N6. I called Beulah Thomas and set up a phone interview on the 31st. Received Liz Douglas' artist's statement via email.

7-27-06 I went to Chester Burnett's house and conducted an interview, which was audio recorded. I took hand notes, transcribed and coded to N6. I transcribed Gertrude Rainey's audio tape and coded to N6.

7-29-06 I went to the Reed's studio and audio recorded their interview. I transcribed the audio tape and coded to N6.

7-31-06 I conducted a phone interview with Beulah Thomas after getting her permission to be interviewed and taped by phone. I did the interview with her and took hand notes, and then I transcribed her tape.

8-4-06 After several attempts to connect with Mac Morganfield by phone we finally spoke and set up a phone interview time on the 8th.

8-8-06 I conducted a phone interview with Mac Morganfield after getting his permission to be interviewed and taped by phone. I did the interview with him and took hand notes.

8-9-06 I transcribed Mac Morganfield's audio tape.

8-12-06 Analyzed the results of phase II activities to this point. Some of the themes that I had noted from SVI still seem strong. I am not sure how to tie the categories in with themes or how to present the materials in the case study yet. The categories/nodes that have a lot of dynamics in terms of the quality of response and amount of energy coming from participants include issues, roles, learning modes or processes, learning activities, benefits, influences, motivations, identities. I will want to talk about these with Dr. O'Hanlon.

8-13-06 I emailed Dr. O'Hanlon to request a meeting in Lincoln on the 18th to discuss the completion of the first two phases of research and the strategy for phase III. I am considering writing descriptive characterizations of each participant. The Starcher dissertation used profile descriptions of various programs and I thought this was a nice trait that I could use in this study.

Appendix E

Example Participant Consent Form



JAMES O'HANLON

Approved by the Human Subjects Committee
University of XXXXXX, YYYYYY Campus
(HSC_). Approval expires one year from
3/28/2006. HSC_ # _____ (information
omitted to protect participants' identities)

University of Nebraska-
Lincoln
IRB#2006-03-309 EP
Date Approved: 04/17/06
Valid Until: 04/16/07

INFORMED CONSENT FORM

Identification of Project: A Naturalistic Inquiry in Lifelong Learning

Purpose of Research: The purpose of this research project is to develop an understanding of the nature of lifelong learning from the perspective of lifelong learners. The participants in this research will have been actively engaged in lifelong learning through formal activities such as noncredit short courses or independent study. This research will be completed by January 15, 2007. You are invited to participate in this research because you are a lifelong learner.

Procedures: Participation in this research will require 2-6 hours of your time in interviews or discussion. The interviews or discussions will take place in a comfortable environment in your home or, if you prefer, the home of the investigator. The initial interview will take approximately 1 ½ hour and will be recorded on an audio tape. The investigator will also take hand written notes. The questions asked during the interview will start with very general questions about your thoughts on lifelong learning and what it is like for you to participate in lifelong learning. As the interview progresses it is likely that you will be asked to identify issues in lifelong learning that are important to you. You may be asked to discuss how you deal with the issues related to lifelong learning.

The following are examples of the types of questions you will be asked:

Approved by the Human Subjects Committee
University of XXXXX, YYYYY Campus (HSC_).
Approval expires one year from 3/28/2006. HSC_
#_____ (information omitted to protect
participants' identities)

University of Nebraska-
Lincoln
IRB#2006-03-309 EP
Date Approved: 04/17/06
Valid Until: 04/16/07

What is it like being a lifelong learner?
Tell me what a typical day is like for you in which you are involved in learning?
How do you participate in lifelong learning?
Why are you involved in lifelong learning?
Are you satisfied with your learning process?
What are the things both positive/negative that I need to understand?
How do you deal with each of these issues?

One or two follow-up interviews will take approximately one hour each. The investigator will transcribe the audio tapes and hand written notes, then use the information from the transcript in developing the content for a case study. The final discussion will take approximately 2 hours and will provide you an opportunity to read the case study that describes the experience of lifelong learners and includes anonymous information for your review. You will have an opportunity to provide feedback to the investigator about the case study and make suggestions to the investigator so that it better represents your thoughts. The final discussion will include you and others like you who have participated in this research and who wish to participate in the final discussion as a group. This group discussion will also allow you to learn from others who are participating in the research as well as allow you to share your thoughts and ideas with them about lifelong learning. Participating in the final group discussion is optional. If you do not wish to participate in this group discussion, you may choose to hold the final discussion with only the investigator.

Risks and/or Discomforts: There are no known risks or discomforts associated with this research.

Benefits: You may find the research process enjoyable and the information may be helpful to you when you engage in lifelong learning. The information gained from this study may help us better understand the perspectives of other lifelong learners.

Confidentiality: Any information obtained during this study which could identify you, including audio recordings or hand written notes, will be kept strictly confidential. The information used in this research will be stored in a locked cabinet in the investigator's office and will be seen only by the investigator, his advisor (the secondary investigator) and a research auditor during the study. The audio tapes will be destroyed as soon as transcriptions are completed and verified by the auditor to represent the content of the tapes. All other materials will remain in the locked cabinet in the investigator's office for three years after the research is completed. The information from this study will be

Approved by the Human Subjects Committee
University of XXXXXX, YYYYYY Campus (HSC_).
Approval expires one year from 3/28/2006. HSCL
_____ (location omitted to protect
participants' identities)

University of Nebraska-
Lincoln
IRB#2006-03-309 EP
Date Approved: 04/17/06
Valid Until: 04/16/07

analyzed, interpreted, and reported through a case study in the dissertation, scientific journals, other published articles, and at presentations at professional conferences.

Compensation: There will be no compensation for participating in this research

Opportunity to Ask Questions: You may ask any questions concerning this research and have those questions answered before agreeing to participate in or during the study. Or you may call the investigator at any time, day or after hours phone, ___ - ___ - _____. If you have questions concerning your rights as a research subject that have not been answered by the investigator or to report any concerns about the study, you may contact the University of Nebraska-Lincoln Institutional Review Board, telephone (402) 472-6965, or the University of XXXXXX Human Subjects Committee YYYYYY Campus (HSCL) at ___ - ___ - _____, or email _____@_____.

Freedom to Withdraw: You are free to decide not to participate in this study or to withdraw at any time without adversely affecting your relationship with the investigator or the University of Nebraska or with the University of XXXXXX. Your decision will not result in any loss or benefits to which you are otherwise entitled.

Consent, Right to Receive a Copy: You are voluntarily making a decision whether or not to participate in this research study. Your signature certifies that you have decided to participate having read and understood the information presented. You will be given a copy of this consent form to keep.

_____ Check if you agree to being audio taped during the interview.

Signature of Participant:

Signature of Research Participant

Date

Name and Phone Number of Investigators

Marvin Hunt, M.A., Principal Investigator

James O'Hanlon, Ed.D., Secondary Investigator

_____-_____-_____
_____-_____-_____

Appendix F
Sample Case Study Revisions Form

Chp	Pg	Line #	Original	Decision/Revision (if any)	Rationale
4	9	18	Ford Foundation by founding a preschool	Ford Foundation by founding, along with several women in the community, a preschool	Participant provided clarification during Grand Member Check, which I accepted
4	10	5	acting as director for the Department on Aging, a	a secretary of aging position at the cabinet level; a	"
5	26	14	Mary considers herself a light or moderate reader	Mary considers herself a moderate reader	"
5	56	16-17	She also notes that the classes offered in other cities through the Osher Lifelong Learning Institute are too far away. (14.19.1.3)*	She also chooses not to attend less interesting classes if they are out of town, but she may attend such classes if offered in town (14.19.1.3).*	"
4	6	8	worked diligently for 10 years in order to gain	worked diligently for 5 years to earn tenure	"
4	6	8	while denying his passion for freehand drawing	while limiting the pursuit of his passion for freehand drawing	"

* These codes, representing Category Outlines nodes, were copied with the text segment into the Case Study Revisions Form. These segments were copied from the version of the case study that included the codes prior to the codes being stripped for the final version.

Appendix G

Sample from Chapter 5, p. 134, Text with Categorical Outline Codes

. . . have had to wait at times in his life (1.3.4; 5.5.1). When offered a position as a new professor of architecture, he “had to put away [his] passion for painting” and become “fully engulfed in class preparation and learning” about the subject matter he would be teaching at the university (1.3.4; 5.5.1). He now satisfies his passion for photography—just one of his artistic talents—by obsessively shooting photos and developing film (5.5.1). In the past, he has kept “20 to 30 rolls of film in the freezer” waiting for processing (5.5.1).

Obsession and compulsion seem to work together for James. After obsessively shooting photographs, he compulsively “saves everything,” despite his tremendous backlog of unprinted photos and incomplete paintings (5.5.1). Similarly, he has been “pretty obsessive about . . . writing different friends” and compulsively saving the written communication so, if he wants, he can return to those communications at a later time” (5.5.1). I believe, after speaking with James, that he carefully archives his unfinished work so someday, when his career as a professor is no longer so demanding, he can return to it with renewed passion.

Mary, James’s wife, has always been creatively active (3.5) according to James. She pursues learning but expresses frustration that her curiosity about photography cannot be satisfied through the local university. She notes that the enrollment process requires full-time student status (14.19.1.3). This especially frustrates Mary because professors specializing in photography have key bits of knowledge she needs (14.19.1.3). I called the university’s Design Department and learned about the complexities . . .

Appendix H

Audit Report

Study on Lifelong Learning

Marvin Hunt

Fall 2006

Jean Ann Summers, Ph.D., Auditor

Brief Study Description:

This is a naturalistic inquiry exploring the perspectives and experiences of individuals who count themselves as lifelong learners. The inquirer focused on learning the stories of 12 individuals who were (a) over 50, and (b) participating in formalized learning situations, such as classes. He collected and analyzed their stories in three phases: (a) initial interviews and analysis, (b) focused explorations in second interviews, and (c) comprehensive member check. Using N6 qualitative software to develop themes or categories describing the information gathered, he identified a series of themes bounded by an “inside/outside” theory – i.e., “inside” characteristics or themes shared by all or most of the participants, and “outside” characteristics being unique variations in their approach to learning.

For the audit, I engaged in several reviews of the inquirer’s materials in order to follow in Marvin’s footsteps as he made his discoveries:

- Listening to audio tapes – I listened to two audio tapes of initial interviews, reading the transcript of those interviews as I listened. The purpose was to determine the accuracy of the transcripts.

- Reviewing N6 coding structure and categories – I reviewed the coding structure and definitions of each category. I sampled 20% of the categories and read the sections of narrative coded in the category to determine (a) whether I could understand (agree with) the designation of the sections coded in that category, and (b) whether there were any sections that appeared to be miscoded.
- Reviewing the methodological log – I reviewed the log tracking activities including the sample, the interview protocols, evolving category outlines, interview notes, and journals. These were useful to determine when, where, and why emergent themes appeared and how they evolved.
- Reading the results – Finally, I read the detailed results chapters to learn what the inquirer did with all these data.

Below is a report of my findings. I address, in turn, the issues of (a) dependability, (b) confirmability, and (c) credibility of this study.

Dependability Audit

The purpose of the dependability audit is to determine whether the inquiry is methodologically sound. As an auditor, I looked for the appropriateness of design decisions and methodological accommodations, with a particular eye to determining whether decisions were shaped by the data, rather than data shaped by an invariant design.

Sampling plan:

The sampling plan began as a convenience sample (i.e., the inquirer chose learners participating in classes at the Osher Lifelong Learning Institute). Only 4 of the initial 7 selected for interviewing were eventually included in the sample. The additional

8 participants in the final sample group were chosen to fill out a purposive sampling grid based on demographic characteristics. The inquirer obtained those participants by asking interviewees for recommendations. This is called “snowball” sampling.

Because qualitative inquiry is intended to explore the *range* of possible responses, purposive sampling achieves this intent by attempting to include representatives of groups of people who might be assumed to differ as widely as possible in their perspectives about the topic. After reading the literature review about lifelong learners provided in Chapter 2 of this dissertation draft, I did not find any reference to a coherent theory about personality traits or other characteristics that might predict systematic variations in approaches to lifelong learning. In the absence of such a theory, therefore, using demographic characteristics to shape the sampling grid – which is what this investigator did – is a reasonable strategy to achieve diversity in the sample. Marvin interviewed 6 men and 6 women, 2 African Americans, and 1 Hispanic. The participants also represented various religious traditions, including Jewish, Catholic, Protestant, and agnostic. Diversity could also be assumed by the different occupations (or former occupations) of the participants; they included people engaged in occupations (a) with an intellectual/learning orientation (librarian, educator, scientist), (b) artistic pursuits (2 artists, 1 woodworker), (c) human services (2 social workers, occupational therapists), (d) entrepreneurs (shoe store owner, various management careers), and (e) builder/farmer.

Concerning sample size, the most important factor is to continue sampling until reaching data “saturation,” i.e., no new information seems to be forthcoming from new participants. I assessed possible saturation by reviewing shifts in the category outlines (the N6 “codebook”) that occurred after inclusion of successive transcripts from the

participants. The codebook evolved through 6 iterations; it appears to have stabilized after about the 7th or 8th participant. Therefore I conclude that the sample size of 12 is adequate for purposes of this study.

Emergent design:

Because the investigator is the “instrument” in qualitative designs, evidence of bias can be found in the *failure* to change in the course of conducting the study. This is because the purpose of qualitative inquiry is to allow the data to take the investigator wherever it might lead. There are two important indicators of possible inquirer bias: (a) evolving interview protocols, and (b) evolving coding structures in the course of conducting an analysis.

Interview protocols for this study included those developed for phase 1 data collection, and follow-up questions developed for phase 2 return interviews with the participants. In the case of the phase 1 interview protocol, these were grand tour questions which were relatively open-ended. Therefore I looked to the raw transcripts to determine whether the inquirer asked follow-up questions and allowed himself to be drawn along the path of the respondents’ trail of thought. I found ample evidence of open-ended conversations in which the interviewer followed up on comments made by the respondent – for example, exploring motivations for organizing a men’s support group (with an eye to determining whether that activity was also a purposeful learning experience).

Phase 2 interview protocols contained follow-up questions individually tailored to each participant’s previous interview. These were specific questions intended to clarify the individual’s previous comments where there appeared to be conflicting statements

(e.g., “you said you are an introvert . . . yet you also talked about asking questions and feeling comfortable interacting with the instructor. . . can you reconcile these points?”). All of the men were asked about whether they try to stimulate other participants to talk, since the first round of interviews suggested many of the women do this – this is a kind of cross-check to learn whether that is a gender-specific action. I take all this as evidence of appropriately letting the data guide the inquiry process.

Finally, for the final Grand Member Check the participants were given full copies of draft chapters and invited to a group meeting to discuss questions, reactions, and corrections. (Marvin also interviewed those who could not attend the group meeting.) A spreadsheet details the exact corrections to the text that resulted from the Grand Member Check. Most of the 44 entries in the spreadsheet are minor corrections of details. Therefore we can conclude (a) that the process did result in changes, and (b) that the interview respondents were satisfied that the results reflected their experiences.

Codebook changes. To review the emergent design with respect to the analysis process. I reviewed the chronological development of the categorical outlines. The analysis used is often referred to as the “constant comparative method,” meaning that the first transcript is reviewed to identify themes, with the resulting list of themes (the “codebook,” or “categories”) compared against the second transcript to produce a revised codebook, and so on throughout all the available data sources. I saw significant shifts in categories between the first, second, and third transcript analyses. Thereafter most of the changes were in the level of detail.

Further evidence of an emergent design is provided in Marvin’s journals, which described his thoughts as he moved through the various interviews. The journal describes

his thought processes both as he moved through the participant selection process, and as he evolved a conceptual framework to organize the data. I conclude, therefore, that the data did drive the emergent design and that the inquirer did respond to and change his approach in the face of emergent themes.

Confirmability Audit

The purpose of the confirmability audit is to determine whether the assertions or final conclusions are grounded in the data. Sources of information to make this determination were (a) a brief accuracy check to determine the accuracy of transcripts based on a review of the audio tapes, (b) reports drawn from N6 categories, and (c) text from Chapters 4 and 5 with references to codes where the data were found that were used in the narrative reports.

Audio Tape Review

I listened to two interviews (Symons 6-9-06, and Hurst 7-3-06) while reading their respective transcripts. The interviewer transcribed the tapes himself, which probably enhanced the accuracy of the transcripts. I found no discrepancies or significant gaps in the transcripts. The transcripts was not verbatim in the sense that it did not contain stutters or encouraging noises from the interviewer, which I believe is entirely appropriate (in fact, including all the “uh huhs,” I believe, actually distracts from grasping the meaning of the speaker/respondent). I conclude from this small sample that the transcripts are an accurate reflection of the interviews.

N6 Reports

I sampled 20% of the substantive categories (ignoring the categories with the demographics of the participants). To do this, I pulled reports of the categories from N6

and read the sections of narrative which had been coded in the relevant category.

Using the definition of the category provided in N6, I reviewed each narrative text to determine whether I could understand why the inquirer had given the passage this particular code. I found no cases of miscoding or inaccurate placement of passages in the sample I took.

In some cases, I did find that sub-categories were perhaps too finely drawn to be useful. An example is in category 4, Integration of Life and Learning. Sub-category 4.2 was “Transporting learning to all areas,” and sub-category 4.3 was “Justify learning by applying learning experiences.” There was considerable overlap of the actual text included in these two sub-categories, and I found it difficult after reading the definitions, to understand the fine distinction between the two. I would conclude that in this case the coding was broken down a little too far and a little too finely drawn to be actually useful. However, since the narrative in Chapter 5 did not go deeply into these categories, I conclude this is not a significant issue and that Marvin himself stayed with the broader construct encompassed by these two sub-categories.

In general, however, I believe the coding structure was useful in providing insights into the overall phenomenon under investigation. Based on his journal entries, I see that Marvin evolved an “inside/outside” framework to organize his thinking about these themes. The “inside” components consisted of common themes and elements across all the participants, and the “outside” components consisted of variations and differences among the participants. These two meta categories appear to provide a useful way of looking at the data, and can be seen across the categories in the codebooks. I

conclude therefore, that the case assertions in the narrative are grounded in the data as organized by the categories in N6.

References in Text

Descriptions, themes, and examples in Chapters 4 and 5 are liberally sprinkled with references to code numbers which refer to the categories in N6 where the relevant information can be found. I sampled about 25 of these references at random and was able to find the passage that served as the basis for the narrative case description. I conclude that this is more than adequate evidence that the case descriptions and discussions were grounded in the data.

Credibility Audit

The purpose of the credibility audit is to determine the “truth value” of the inquiry. Credibility is analogous to validity in the quantitative world of inquiry. To determine credibility, I looked for evidence of (a) prolonged engagement / persistent observation, (b) triangulation, and (d) member checking. The primary source of information for this evaluation was in Marvin’s methodological log, although I checked some of his reports against my own reading of the data and the narrative.

Prolonged Engagement/Persistent Observation

Marvin provides a log describing total time spent with each respondent. The average amount of time spent in actual interviews across the three phases of data collection was 4.7 hours. This does not include additional time spent with the respondents in the course of their participation in Osher Institute classes. Marvin also describes spending additional time checking with respondents about the written and audio recorded material, time spent setting up interview appointments, and other interactions

with the respondents. Whether this amount of time can be considered “prolonged engagement” depends on the school of thought or the type of qualitative methodology. From the point of view of an ethnographer (where the investigator may spend months at a time as a participant observer and interviewer) this does not qualify as “prolonged engagement.” From the point of view of a naturalistic inquirer, however, the amount of time spent with each respondent does qualify as “prolonged engagement,” in the sense that it gave the investigator adequate time to become familiar with the respondents and to build their trust. I believe that his familiarity with some of the participants outside the study arena, gives added support to the credibility of the length of his engagement with these participants.

Persistent observation is even more clearly in evidence. The spreadsheets showing how Marvin followed up with additional questions for participants at the second interview are good evidence of persistent observation. There was extensive follow-up and exploration of issues raised in the first interview.

Triangulation

The bulk of the data for this study arose from one data source, i.e., interviews. However, additional data sources in the form of materials (e.g., store brochure) associated with the interviews were also collected. Also, Marvin checked facts with additional sources, e.g., verifying with the University why it was difficult for one learner to enroll in photography classes as a part-time student.

Triangulation across participants, as Marvin asked follow-up questions in the second round of interviews to determine whether they also experienced some of the issues brought up by other participants in the first round of interviews (e.g., checking to

see whether men also encouraged fellow classmates to speak up, as some of the women participants said they regularly did). These cross-checks across participants, added to the “truth value” of the inquiry by establishing common threads across the participants.

Another form of triangulation is peer debriefing. Peer debriefing is difficult to accomplish in the absence of a team-based project. Marvin got around this problem by identifying a colleague who was willing to serve as a peer debriefing partner. This person served in that capacity from the early stages of the project design, through the conclusion of the study. Marvin’s log contains a record of each contact with the peer debriefer and the content of their conversations. The log provides important insight into the emergent design of the study, reported above.

Member Checking

Member checking is the process of determining whether the participants can agree with the emergent themes in a study and also whether they confirm the accuracy of the information provided. There were three levels of member checking used in this study. First, the “mini” checks, were interwoven throughout the interviews, including the interviewer’s summaries of points made by the respondent, followed by an invitation for the respondent to correct the point. The Phase 2 interviews were another level of member checking, where Marvin tailored each interview to focus on unexplained information, conflicting comments, or otherwise to gain deeper understanding of the comments from the first interview.

Finally, the Grand Member Check provided a third level of checking with the participants. Each participant was given a draft of the results of the study and asked to

review it for accuracy, any violations of confidentiality, and overall reactions to the findings. The participants were invited to a group Grand Member Check meeting, which was attended by 8 of them, to share and discuss the findings. Marvin also followed up with telephone interviews with the 4 participants who had been unable to attend the group meeting. The methodological log contains a detailed spreadsheet showing corrections to the report based on the Grand Member Check.

Conclusion

In conclusion, after extensive review of the data sources, the methodological log, and the reports of finding, I can conclude:

- The study demonstrates dependability in its sampling methods, emergent design, data collection, and analysis.
- The study demonstrates confirmability in its clear and accurate connection of the conclusions to the N6 categories and back to the raw transcripts and tapes.
- The study demonstrates credibility in its persistent observation; triangulation of findings across members, across data sources, and in peer debriefing; and in the multiple methods employed to achieve member checking.

As an auditor, I therefore attest to these results as being dependable, confirmable, and credible.

Jean Ann Summers, Ph.D.

Auditor's Letter of Attestation

Jean Ann Summers
2318 East 109th Terrace
Kansas City, Missouri 64131

October 18, 2006

To Whom it May Concern:

Marvin Hunt, Doctoral Candidate, has contracted with me as an independent auditor, to review his study related to lifelong learning processes, and to determine whether there is evidence of appropriate and reliable use of recognized qualitative approaches to establish the trustworthiness of the study.

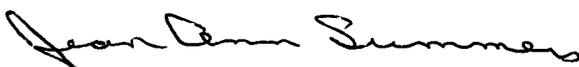
I certify that I am independent auditor; I did not participate in any way with the design, data collection, analysis, or report writing of this study. I further certify that I am knowledgeable of established methodology in qualitative research, particularly naturalistic methodologies.

After extensive review of the data sources, the methodological log, and the reports of findings, I can conclude:

- The study demonstrates dependability in its sampling methods, emergent design, data collection, and analysis.
- The study demonstrates confirmability in its clear and accurate connection of the conclusions to the N6 categories and back to the raw transcripts and tapes.
- The study demonstrates credibility in its persistent observation; triangulation of findings across members, across data sources, and in peer debriefing; and in the multiple methods employed to achieve member checking.

I therefore attest to these results as being dependable, confirmable, and credible. Please refer to my detailed report for a description of the evidence I used to draw these conclusions.

Thank you.



Jean Ann Summers, Ph.D.
Independent Auditor

Auditor's Short Biography

VITA

General Information

Name: JEAN ANN SUMMERS

Date of Information: October 2006

Current Principal Job Title

Associate Research Professor
Beach Center on Families and Disability
Schiefelbusch Institute for Lifespan Studies
University of Kansas

Education Experience

B.G.S., University of Kansas, Human Development and Family Life, 1982
Ph.D., University of Kansas, Special Education, 1987

Fields of Major Scientific Interest

Research in family theory and application of theory to intervention and family support; curriculum design and training in families, family support, developmental disabilities, special education, and disability policy; applied research and program evaluation in family and human services; research on families with multiple challenges; qualitative research methodology and integrated qualitative/quantitative research designs.

Publications

More than 50 articles, books, and book chapters. Recent examples:

Summers, J.A., Templeton-McMann, O., & Fuger, K. (1997). Critical thinking: A method to guide staff in serving families with multiple challenges. *Topics in Early Childhood Special Education*, *17*(2), 27-52.

Summers, J.A., Raikes, H., Butler, J., Spicer, P., Pan, B., Shaw, S., Langager, M., McAllister, C., & Johnson, M. (1999). Low income fathers' and mothers' perceptions of the father role: A qualitative study in four early head start communities. *Infant Mental Health Journal*, *20*(3).

Summers, J.A., Steeples, T., Peterson, C., Naig, L., McBride, S., Wall, S., Liebow, H., Swanson, M., & Stowitschek, J. (2001). Policy and management supports for effective service integration in Early Head Start and Part C programs. *Topics in Early Childhood Special Education*, *21*(1).

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