A Framework for the Design of Educational Programming
For the Older Adult

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A Thesis

in

The Department

of

Education

Presented in Partial fulfillment of the requirements
for the degree of Master of Arts at
Concordia University
Montreal, Quebec, Canada

March 1984

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ABSTRACT

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This thesis develops a framework for educational programming for the older adult. The elderly are an increasing proportion of the Canadian population whose educational level is expected to increase in the future.

The proposed framework takes into account the pertinent factors (social, cultural, economic and educational position of the elderly, certain sociological trends and needs, goals and interests of the older adult) which an educational programmer should address when designing organized plans for learning. The thesis also proposes that the educational programmer should possess knowledge of various theories of aging: disengagement theory, activity theory, role loss theory and age stratification theory. In addition, activity theory, the programmer should be aware of the obstacles that limit participation and should have a critical knowledge of existing educational programs. This will mean that the programmer is aware that conditions for the implementation of educational programmes change from one situation to another depending on the human agency and social system through which they will be translated into practice and this awareness will guide the design of each specific program. It is hoped that the proposed framework would make educational programs more accessible to the older adults and would provide them with an informed choice of participation.

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Chapter 1

The Problem

Introduction

The past decade has witnessed an increased sensitivity to the social, psychological, and economic problems that beset North America's older adults, those individuals aged 65 years and older. Pension benefits, housing, transportation, health, and institutionalization constitute several of the issues that have begun to receive attention.

Presently, programs like Meals on Wheels and homemaker services are geared toward the basic needs of the older adult: food, clothing, and shelter. Programs of this nature are based on the social service model, the domain of welfare. According to Barbara Fulgraff (1978),

> Only recently, the debate was transferred from the field of welfare to education. Educational programs for older adults for a long time are tainted by disengagement theory.
>
> Old people themselves seem to share the same attitude about learning and education...it may be of value for individuals of middle years to further occupational career patterns but does not offer a perspective for the latter years. (p. 51)

Lumsden and Sherron (1978, p. 93-95) think that the belief that "education is a right of all people" in contemporary society is a myth. They refer to various social scientists who view education for the older adult as only icing to be added to the cake. In other words, Maslovian first order needs of food, clothing, and shelter must first be adequately provided. Lumsden and Sherron state, "According to the way of thinking, not until essential services have been provided can the frill of continuing education be added" (p. 94).

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During the past few years, various authors (Eurich, 1978; Lumsden and Sherron, 1978; Peterson, 1976) have advocated that education should be an essential right for the older adult, as for other age groups of society. The older adult is also becoming increasingly more vocal in his demands for equal access to education. During the _Commision d'etude sur la formation des adultes_, groups of older adults contributed to local hearings. Larry Depoe (1981) reports one of the responses of an older adult participant addressed to Michelle Jean, the President, "Your commission will die before we do. We have a lot to offer you, but you put us in the garbage too early" (p. 3).

Traditionally, education has been perceived to be a "Preparation for Life." Therefore, from this youth-oriented. viewpoint, it is difficult to justify the feasibility of educating older adults, who generally are no longer employed. Youth are perceived as providing the economic productivity of the future. It is somewhat difficult to persuade policy makers and taxpayers of the economic advantages of educational expenditure in regard to the older adult. According to Alvin C. Eurich (1978) the President of the Academy for Educational Development in the United States.

> The traditional notion that education is a preparation for life is giving way to the realization that learning is an integral part of life itself---that is an enriching, challenging, and rewarding spark of curiosity and continues for as long as that spark remains alight. (p. viii)

Eurich is supportive of the contention that educational expenditure is a worthwhile venture for the older adult. He

perceives education as a lifelong or recurrent process beneficial to all age sectors of the population, as long as individuals are sufficiently motivated to partake of educational endeavours.

David A. Peterson (1976) acknowledges that educational activities designed for the older adult are ameliorative and preventative. He defines educational gerontology (emerging from the two fields of adult education and social gerontology) as "an attempt to interface the process and institutions of education with the field of aging so that the quality of life for older citizen can be improved" (p. 62).

The position promoted in this thesis is that education for the older adult is ameliorative, preventative, as well as a worthwhile investment for society. For example, if more money from government, labour,and the university (offers were allocated to such domains as preretirement education, nutrition, biological, psychological, and legal education for the older adult --- could this not save expenditures that are currently spent on hospital care and nursing homes? The preventative role of education for the older adult is analogous to crime preventions, preventative medicine and dentistry. The initial financial output may be costly but future dollars may be saved in treating the sick and criminal.

In adhering to the medical model approach of treating the elderly as senile, deteriorating individuals by only increasing medical and social services, one is treating the

symptoms and not the causes. Instead, the position fostered here is that older adults are healthy, aging, individuals who are undergoing certain biological, social, economic, and psychological changes in the final segment of the life cycle. The older adult should be given the opportunity to choose to be educated his/her of rights, to partake in a second career, to enjoy meaningful leisure and to pursue educational activities for their own sake. What is crucial to this viewpoint is that various educational opportunities exist and should be extended to the older adult. If this were the case, the element of choice of participation in educational endeavours would be strictly in the hands of the older adult.

Aim of Thesis

It is the aim of this thesis to develop a framework for the design of educational programs for the older adult. A framework is a basic structure consisting of pertinent factors that should be included in deliberate planning for educational programs for the older adult. Educational programs are organized plans for learning. Hiemstra's (1976) definition of learning is utilized, "an acquisition of knowledge, attitudes, or skills, and the mastery of behavior in which facts, ideas, or concepts are made available for the individual's use" (p. 333). Both formal and nonformal educational programs are to be discussed. Formal educational programs include organized plans for learning such as courses, seminars, etc. within the institutional framework such as adult education courses and programs at high schools, CEGEP's, community colleges, and universities. Nonformal

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educational programs include organized plans for learning sponsored by senior centres, churches, community groups, labour unions, companies, libraries, and museums.

"The older adult", "persons in their latest years", (PLY'S) or "the elderly" refer to those individuals aged 65 and over. It is not because age 65 is a magic point of demarcation between the middle-aged and the older adult; many countries, including most of Canada utilize 65 as the mandatory retirement age. In addition, most studies in aging define the older adult as 65 and older. It will be noted when the term "older adult" includes individuals less than 65. Abu-Laban (1978, p. 125) points out that there are also two generations of individuals over the age of 65. There should be recognition of differences of those in the 65-74 age category and those 75 and over in terms of health and probable availability of family support ties.

A rationale for the aim of this thesis will be provided in the second chapter by discussing the social, economic, and educational factors that have contributed to the present focus on the elderly. An examination of the educational needs, interests, and goals of the older adult, emphasizing McClusky's (1974) margin theory of needs and Londoner's (1978) instrumental/expressive dichotomy will be included. The perspective that has been adopted is that educational programs must respond to the present, social, economic, and educational situation of the elderly and to their needs, interests, and goals.

Since there are to date no theories of educational gerontology, chapter three will critically analyze various theories of aging and interpret how each theorist views the educational needs and interests of the older adult. In essence, the educational implications of various theories of aging will be explored.

Chapter four will present the various limitations and obstacles that have prevented pursuits. Chapter five will evaluate Elderhostel and preretirement programs in Pontiac County, as two examples of educational programs for the older adult. The final chapter will establish a framework for the design of educational programs for the older adult. This proposed framework should respond to the present situation of the elderly, their needs, interests, and goals, evaluation of various theories of aging, limitations and obstacles that inhibit participation, and critical examination of existing educational programs. On the basis of this framework for the design of educational programming, a brief comparison to the recommendations of the Jean Commission will be provided.

The discipline of educational gerontology is such an emerging and recent field that there is a need for critical assimiliation of data concerning educational programming. Wass and West (1977) contend that programs, activities, and classes for the older adult are devoid of theory underlying these programs. "Most are hodge-podge emphasizing such things as transportation and small group versus large group instruction" (p. 410). There is also a need to rise above rhetoric and semantic arguments existing among various

theorists and extrapolate commonalities that have long been neglected.

There are various reasons to go beyond the level of critical analysis to the establishment of a framework for the design of educational programming:

1. to synthesize various theories of aging in regard to education and the older adult.

2. to fuse the relationship between theory and practice.

3. to provide a framework that could evaluate existing educational programs.

4. to lay ground in instituting improvements in future programs.

Chapter Two

Social, Economic and Educational Factors
Concering the Older Adult in Canada

Introduction

Chapter two is an attempt to proyide a sociological background in order to help identify the needs and interests of the older adult. Social, economic, and educational factors pertaining to the older adult in Canada today will be discussed as well as their educational implications. In addition, a discussion of the needs, goals, and interests of older adults defined by McClusky (1974) and Londoner (1978) will be explored.

Socio-Economic Factors
Increase in the Proportion of Elderly

There are various social, economic, and educational factors which have contributed to our present focus on the older adult. The percentage of older adults in the Canadian population is steadily increasing. According to Statistics Canada, (1979, pp. 2-3) only five percent of the population was over 65 in 1901. By 1976, the percentage has risen to 8.7% or 2,002, 345 individuals. It is expected that the proportion is likely to increase between 11 and 13% by the year 2001.

Especially rapid growth is expected between 1980 and 2000 for those individuals aged 80 years and older. There were approximately 436,000 Canadians at mid-1980 and it is predicted that there should be at least 770,000 at the end of the twentienth century. (Canadian Governmental Report on

Aging, 1982, p. 1)

The United Nations considers a country to be "elderly" when more than eight percent of the poulation is over the age of 65. Canada has been classified as "elderly" since the 1971 census, with 8.1% older adults in the population. But Canada's percentage of older adults is still lower than the United States (10.7%), France (13.6%), United Kingdom (14.2%) and Sweden (15.1%). (Statistics Canada, 1979, p. 1)

There are various reasons that account for the relatively high growth of older adults in Canada. In fact, Canada's elderly population increased by 14.8% between 1971 and 1976; whereas, the entire population increased by only 6.6%. The major reasons enumerated by Statitics Canada (1979, p. 2) include high birth rates during the early part of the twentieth century, immigration of 2.6 million individuals aging from 20 to 35 years between 1911 and 1931, medical advances, and improvements in the standard of living.

The largest numbers of older adults reside in Ontario, Quebec and British Columbia. The 1976 census demonstrates that 36% of the older population resided in urban centers of 500.000 or more. In Manitoba and Saskatchewan small towns possess as many older adults as countries such as Sweden. During the sixties and seventies, small towns witnessed the fastest rates of population aging in Canada. (Canadian Governmental Report on Aging, 1982, p. 1)

Many have experienced the impact that the post World War II baby boom has had on various institutions in society,

particularly educational institutions at all levels. Increases in the proportion of the elderly will also have important social, economic, and political repercussions, in regard to health care, pensions, and the planning of housing. The adult educator must keep in mind the high density of elderly individuals inhabiting small towns, as well as the increase in those 80 and over in the next two decades when planning programs for the older adult.

Older Adult Women, Older Adult Men

The 1976 census (1979, p. 4) reported that there were only 777 males to every 1,000 females. This trend is not uniform for both urban and rural areas. The Canadian Governmental Report on Aging (1981, p. 2) reports that there are generally more older adult men living in rural areas than females. Whereas, in 1976, urban centres of 500,000 or more in population had only 66 men per 100 women in their aggregate population aged 65 and over (the national figure was close to 78 men per 100 women aged 65 and over). But both the rural non-farm and the rural farm areas had more men than women in the older population.

It appears that men in urban areas have not benefited as much as women from declining death rates. Professor J. Levy, at a McGill Conference on Aging and Physical Fitness (march, 1981) postulated that female lifestyles are more conducive to longevity than males. Levy speculates that women never really retire completely and maintain their homemaker roles when they reach the age of 65. Such an explanation may hold for certain older adult women today who

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often maintained traditional homemaker roles throughout their entire lives. But with the influx of women in the labour market, many maintain dual roles of worker and homemaker. It will be interesting to see whether women will continue to outlive men in the future, as greater proportions of women join the labour market.

In urban areas, there are higher proportions of older adult women present. This factor may have implications for the design of educational programming. Perhaps the educational needs of the older adult female will differ from the older adult male. The media has depicted quite vividly the predicament of elderly women, in particular the widowed homemaker who usually has very little in the way of pension benefits. Judith Posner (1977, pp. 80-87) describes being old and female as the "double whammy". She states:

> Aging and dying are not sexless. In many ways the aging process reflects and exaggerates various issues related to male-female socialization or sex-role stereotyping. It is no coincidence that a great deal of gerontological literature focusing on men deals with retirement and than an increasing amount of literature focusing on women deals with widowhood. (p. 87)

Posner also emphasizes that older women are also often the victim of the "war on the wrinkles" (p. 86) often reinforced by advertisements. She concludes that physical aging tends to be more traumatic for women than for men in North America.

In rural areas, the adult educator should be sensitive to the higher proportions of older adult men. Farm workers are often self-employed and are able to retire at their own

discretion.   Such issues as financial planning for farmers should be considered for the older adult farmer.   In addition, the educational programmer when planning preretirement sessions should be aware of the possible differences in the aging process for men and women.

Participation in the Labour Force

The proportion of older adults active in the labour force has been steadily declining for the past fifty years. According to Statistics Canada, (1979, p. 18) in 1921, 33% of Canada's elderly were employed.   By 1976, this percentage has declined to 12.2%.   Prior to the advent of industrialization and urbanization in Canada, many older adults were engaged in various forms of agricultural work.

There appears to be an important difference in regard to the participation rate of older adult men and women in the labour force.   During the past five decades, the participation rate of males had decreased.   On the other hand, the participation rate of older adult women decreased slightly between 1921 and 1951, but increased and reached a peak of 8.3% in 1971. (Statistics Canada, 1979, p. 19)

Denton and Spencer (1980) have investigated the population and labour force growth in Canada historically and have proposed certain forecasts for the future.   They are cognizant of various changes in the labour force such as the shortening of the work life of the average male.   This phenomenon can be accounted for primarily due to earlier retirement, as well as previously cited, female participation

rates in the labour force have increased substantially.

There have been various doomesday projections articulated concerning the possible drying up of the Canadian Pension Plan. In other words, future increases of the elderly population would impose an unmangeable burden on the population of working age. Denton and Spencer (1980) have adopted a more optimistic view. They have stated, "There will be no "crisis" associated with the expected general aging of the population, as some have suggested" (p. 25). They have assumed that fertility rates will not rise to high levels and that a decrease in the relative size of the youth population will coincide with an increase in the relative size of the elderly component. In addition, they expect a slight increase in the population in the middle years. But the projected changes in the age structure of Canadian society will not be without social and economic ramifications. Denton and Spencer conclude:

> None the less, there are important implications in
> term of educational, health care, pensions, and
> other requirements which should be anticipated as
> a basis for informed social planning and policy
> formations. (p. 25)

Generally speaking, the Canadian population is retiring earlier and there appears to be no "crisis" associated with the growing numbers of elderly in our population. Early reitrement may leave more time for leisure or the possibility of a second career. Declining enrollments in public schools and in some universities are encouraging administrators to expand their horizons and include adult education as an important ingredient of academic life. On the other side of

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the coin, there is a growing movement to abolish mandatory retirement at the age of 65 as dicrimination on the basis of age.

Income Level

The incomes of the older adult are composed primarily from the following sources: transfer payments, employment investments, and private pensions. According to Statistics Canada (1979, p. 14) transfer payments (which include Old Age Security Payments, Guaranteed Income Supplement and Spouse Allowance) constitute the principal source of income for the older adult. They accounted for 39% of total income to family units with heads 65 and over in 1975. As previously discussed, since such a high proportion of older adults are fully retired and not working, employment income forms only 32% of income of older adult family units. On the other hand 29% of income consists of investment and private pensions.

There are various problems involved with private pensions. Terance Wills (1980, p. 17) states that only half the fulltime employees working in the private sector aged 25 to 64 are members of employee-sponsored pension plans. Despite the fact that our society is highly mobile, private pensions are usually not portable and many years of service are required before vesting is achieved. There is the additional problems that private pensions are not indexed to inflation.

Neena L. Chappell (1980) envisages the current economic

situation of Canada's elderly as being closely linked with federal social policy. She refers to studies conducted by Collins (1978, p. 102) and Dulude (1978, pp. 41-45):

> This is evident from their economic situation: 55% were receiving all or part of the guaranteed income supplement in 1976. In other words, over half have such minmal income, even after receiving the universal old age security payment, that additional funds are necessary for their survival. Furthermore, all federal assistance programs together with provincial supplements total an amount less than the poverty line set by the Economic Council of Canada. (p. 35)

Besides a large proportion of elderly living below the poverty line, single older adults and families with heads 65 years and older spend a higher proportion of their incomes on food and shelter, than other age sectors of the population. Statistics Canada (1979, p. 16) reports in 1974, for example, unattached individuals 65 years and over, living in 14 major cities across Canada spent 52.7% of their budgets on food and shelter. In comparison, all unattached individual spent only 36.6% of their budgets on these two items. The unattached elderly spent a relatively smaller proportion of their income on travel, transportation and contributions to unemployment insurance and pensions. But both groups of unattached individuals spent equal amounts of their budget on recreation.

The economic situation of Canada's elderly must be considered as an important variable in the design of educational programming for the older adult. McClusky (1974) and Londoner (1978) are extremely articulate in stating that the "coping" and "instrumental" needs of the elderly be met

in their proposals for educational programming. In addition, preretirement education should prepare the worker and his/her family to plan for the financial realities of old age.

Health

It is no mystery that there are certain biological and psychological changes that accompany the aging process. With medical advances, the elderly today live longer and healtheir lives than previous generations. In Canada in 1976, the expected remaining years of life for men at age 65 were 13.95 years, for women it was 18 years. (Canadian Governmental Report on Aging 1982, p. 44)

Health is defined in the World Health Organization's basic charter as a state of complete physical, mental, and social well being and not merely the absence of disease. (C. G. R. on Aging, 1982, p. 13) Yet many studies tend to focus on disease and hospital confinement. Statistics Canada (1979, p. 20) states that hospital confinement for the elderly is 25.2 days in comparison to the national average which is 11.3 days. Mental disorder is the major reason for hospital confinement. Although researchers have attempted to prove that mental deteoriation is not inevitable, society's predominant view of the elderly is one of senile, phsyically, and mentally deteoriating individuals. Caroll L. Estes 91981) promotes the World Health Organization's definition of health in her discussion of senility which,

> occurs for less than six percent and is often due
> to drugs, loss of social support and depression,
> rather than irreversible organic changes in the
> brain. Current approaches that ignore the role
> of social and economic factors in the health of

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the elderly are therefore unlikely to improve the experience of being old for most Americans. (p. 6H)

There are certain educational implications in regard to health. For example, educational programs that focus on preventative medicine, emphasizing nutrition, exercise, and the physiology and psychology of aging may decrease hospital confinement and institutionalization of the older adult. If such programs are to be effective, they must begin with prenatal classes and extend to all age sectors of the population. In Quebec, CLSC's offer educational programs and services to the elderly such as homemaker services, visiting nurses and nutrition and exercises for the older adult. The philosophy behind such programs is to keep the elderly in their own homes for as long as possible as healthy, independent members of society.

Family Life

The Walton's romantic image of the extended family living in domestic bliss has permeated North Americas thinking as an ideal family image. Sahron McIrvin Abu-Laban (1978, p. 133) does not adhere to this romantic advocation of the multi-generational living arrangement. She questions whether three generational households were ever very common. It appears that the extended family was historically an uncommon phenomenon in Canada. The history of immigration in our country suggests that the young are the ones who are most likely to move. In addition, not many individuals lived to old age and the norm of independence seems to have operated in North America for quite a while.

Considerable research has been conducted concerning the elderly and their adult children. The findings state (McIrvin Abu-Laban, 1978, p. 132) that older adults are in frequent contact with their adult children. But it is extremely difficult to measure the quality of this contact. In addition, information is lacking concerning those older adults who have infrequent contact with their children.

According to the unpublished data from the 1976 Census of Canada, the aged family remains an important component in society. Just over 66% of those 65 and over shared a dwelling with at least one person related by blood, marriage, or adoption (the so-called "economic family"); almost four percent shared a household with non-related persons; and finally, almost 22% lived alone in their own household, while the remainder lived in some form of "collective housing" (nursing homes, hospitals, or rooming houses). (Canadian Governmental Report on Aging, 1982, p. 77) Although a high proportion of Canada's elderly do live in a family setting, this gives us no indication of the quality of relationships between family members.

The older adult is able to survive financially at least for basic needs with the help of income security programs. Governmental programs such as homemakers services by ClSC's in Quebec, senior transportation projects, and Meals on Wheels are designed to provide services to those older adults who need more help then their families can manage or for those who have no family nearby.

The adult educator should also not leave out the important role of the family when designing programs for the older adult. Programs that encourage intergenerational relationships could be fruitful for older adults, who have little interaction with their families.

Educational Level

Although it is difficult to precisely depict the qualitative side of the relationships of the elderly and their children, it is an easier task to describe the increasing educational levels of the older adult. In the future, a higher proportion of the elderly will be more educated. Statistics Canada (1979, pp. 20-24) reports that over half the elderly in 1976 had completed elementary school, approximately one third had attended high school, 4.5% had attended some university, and 2.6% possessed a university degree. Statistics clearly demonstrate how educational opportunity has increased since today's elderly attended school. For example, in 1976, more than half of the population between 15 and 64 were high school graduates, and 6.8% had university degrees.

The implications of an increase in educational level is far-reaching. Harold Entwistle (1970, p. 137) contends that a person's ability to cope with the problems of retirement may depend upon the quality of his formal education when young. Entwistle is an advocate of education as a preparation for "life-long life." Their is also a probable link between educational level and successful retirement. (Report of Special Sante..on Retirement..., 1979, p. 124)

Furthermore, it appears that the more educated elderly are high consumers of continuing education. (Havinghurst, 1976, pp. 45-46)

Leisure

Since today's older adults generally retire earlier and live longer, they also possess a considerable amount of leisure time at their disposal. How is this preponderance of leisure time accounted for? Milton (1975) analyzed the responses of approximately 50,000 adults to determine the degree and type of participation in a variety of leisure activities. Leisure pursuits were divied into three qualtiative types: home-centred leisure activities, outside-the-home/low interaction activities, and outside-the-home/high interaction leisure activities.

McPherson and Kozlik (1980, p. 115) report Milton's findings with reference to age as an independent variable. There was a positive correlation between age and involvement with television, radio, and reading for home-centered activties. Age was inversely related to record listening. For outside the home/low interaction activities age was inversely related to attendance at paid and free events, to physical activity and to hobbies. One exception to this pattern were males over the age of 65 with higher levels of educational attainment who reported greater involvement in physical activity than the less-educated younger groups. In 1976, Statistics Canada, (McPherson & Kozlik, 1980, pp. 115-124) also reports that 37% of older adults engage in some

type of exercise.   In general, participation rates increase with levels of education and with income.

A report, arising from the Canada Fitness Survey, reveals the most recent findings in regard to physical fitness and the elderly.   Nearly three times as many individuals aged 65 and over aprticipated in sports in 1981 than in 1976.   Twice as many individuals between the age of 55 and 64 years took part in active sports.   For such physical activities like walking, jogging, running, cycling, calisthenics, and fitness classes, no other age group has increased its activity so much as those 65 and over. From 1976 to 1981, the participation level has jumped from 50 to 63%. (Homemaker Magazine, 1983, p. 60N)

The last decade has witnessed a renewed interest in physical activity by all age sectors of the population.   It is encouraging that the participation rate in fitness programs of older adults has increased so much in the past five years. ¹ Attempts should be made to appeal to all older adults - not just the educated middle class.

The Educational Needs, Goals, and Interests of the Older Adult

The social, economic, and educational factors that have contributed to our present focus on the older adult have just been explored.   It appears that a solid foundation is needed concerning the present situation of the elderly before discussing educational programming.

It is the purpose of this section to explore the

importance of education responding to the needs and interests of the older adult. Educational theorists have been extremely articulate in their discussions of education responding to the needs and interests of the child. John Dewey, in his advocacy of the "new education" considered a child's needs and interests to be paramount in the development of the curriculum. In the Child and the Curriculum, Dewey (1902) describes the "new education" as perceiving the child, "as the starting point, the centre, and the end. His development, his growth is the ideal. It alone furnishes the standard; they are instruments valued as they serve the need of growth" (p. 343).

As with the child, various authors attribute different levels of importance in the consideration of the needs and interests of the older adult in the development of educational programs. Howard McClusky (1974) enumerates a hierarchical system of needs as an outline for the development of educational programs for the older adult. Londoner (1978) stresses that the survival goals of the elderly be analyzed first before considering either their instrumental or expressive needs.

McClusky: Margin Theory of Needs

McClusky (1974) entitles his theory a margin theory of needs. He forsees the older adults as constantly engaged in a struggle to maintain the margin of energy and power they have possessed in earlier years. (p. 329) Margin is perceived as a function of the relationship of load and

power. Load is defined as the self and social demands made on a person in order for him to maintain a minimal level of autonomy. Power is defined as resources, abilities, possessions, positions etc. which a person can command to cope with load. McClusky (p. 330) envisages the major task of the later years, as a rearrangement of load and power to preserve a favourable margin. He provides an application of his proposal. For example, the older adult could replace the load of upward mobility with the load of various tasks of community service. He proposes a program of study and training in order that the older adult can increase his ability to engage in such activities (as community service); the resulting margin could conceivably be more productive, satisfying, and growth inducing. It is McClusky's main intention that education will assist the elderly in creating margins of power for the attainment and maintenance of well-being and continuing growth toward self-fulfillment (p. 330)

The following is a resume of McClusky's hierarchical system of needs as an outline for the development of educational programs for the older adult.

1. coping needs: basic education skills: 3R's, physical fitness and health and economic self-sufficiency.

2. Expressive needs: engaging in activities for thier own sake, that are enjoyable and meaningful.

3. Contributive needs: activities that promote the need to help others and the community.

4. Influence needs: activities that encourage the

older adult to participate in the decision-making process of society in order to improve their situation and that of others.

5. Transcendance needs: activities designed to continue to achieve self-fulfillment.

McClusky (p. 331 refer to Good's (1959) definition of a need as "a requirement for survival, growth, health, social acceptance" etc. In McClusky's analysis of needs of the older adult he is dealing with a range of need - utilizing a minimal-optimal scale. For example, survival needs are considered to be minimal, while growth needs are considered optimal.

In many ways, McClusky's scheme is similar to that of Abraham H. Maslow, who believes that mature human growth is dependent upon "need gratification or growth motivation" (Lewis, 1979, p. 15). Both theoreticians believe in hierarchical needs that commence with the most basic needs. Maslow foresees that as each lower need fulfills itself (by being appropriately and sufficiently gratified) the individual is able to move to the next need level). McClusky, defined need fulfillment when a margin of power in the load/power ratio is left over with which to meet higher needs.

The needs enumerated by both theoreticians tend to differ. Maslow's hierarchy of needs include: physiological needs, safety needs, belonging and love needs, esteem needs, the need for self-actualization, the need to know and

understand, and aesthetic needs. (Lewis, p. 15) What differs in McClusky's scheme is that he considers social and political participation (influence needs) as important variables for the older adult in their process of self-fulfillment. Maslow has spoken strictly in biological and psychological terms. He has not perceived the older adult as an agent of social change. McClusky foresees the role of education as being isntrumental in incresaing the older adult's influence in the personal realm. But he furthers his hierarchical scheme by indicating that education can also be designed to help older people bring about constructive change in society as well. Such a goal can be achieved by educating the older adult of his rights and power in the decision-making process of society. For example, the educator should concentrate on issues that are particularly pertinent to the older adult such as health, income, housing etc. McClusky states that this will, "enable the elderly to have a stronger voice in the broader issues of fiscal policy and human relations affecting the welfare of the community at large" (p. 336).

McClusky does not adhere to the position that mere educational programming for the older adult will narrow the gaps of social inequality in our society. He is discussing a range of needs, from survival through maintenance, to growth and beyond, realizing that although education has a significant role to play, it must be accompanied by other social, economic, and political measures.

McClusky is imposing his own framework of needs upon

the elderly. He did not venture out into the field and ask the elderly what they considered their own needs to be. Carroll A. Londoner (1978) is critical of the followers of Maslow who "speak freely of people having safety, love, self-esteem, and self-actualization needs -as if they were concrete realities." Instead Londoner adds, "They are inferred, underlying causal factors that Maslow postulated to explain present-real-time behaviors he observed as a psychologist" (p. 88). This critique of Maslow's theory can be applied to McClusky's hierarchy of needs - if it is interpreted as concrete realities. If McClusky's scheme is utilized as only a guide for the development of educational programs for the older adult, it may prove to be a beneficial outline.

Furthermore, besides imposing his theoretical framework of needs upon the elderly, McClusky is defining in his own terms what it means to be a successful ager. In the third chapter of this thesis, the educational implications of various theories of aging will be examined. It will be demonstrated how the activity theory has been criticized for contributing to a value-laden conception of what it means to be a succesful ager. It is ironical that McClusky who is trying to alleviate the "load" of upward social mobility with community service, is still caught up in defining his own measures of "success" for the older adult.

Londoner = Instrumental vs Expressive Needs and Goals

Although McClusky's framework concerning the needs of

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the elderly is purely theoretical, considerable empirical research has been conducted concerning the instrumental and expressive needs of the older adult. Caroll A. Londoner (1978. pp. 75-91) is particularly interested in the thoeretical basis underlying the concepts of instrumental and expressive orientations as a means for assessing the educational needs and goals of the older adult in relation to program planning.

Londoner's model is briefly a "needs - social system - goal gratification" framework. He attempts to explain educational participation of the older adult by this framework, which is based on the theoretical constructs of instrumental-expressive needs and goal gratifications of Talcott Parson's social action theory. Needs are defined as such:

> People have needs that trigger cultures of present time behaviors, these present time behaviors are designed to achieve goal gratifications; and that when goals are achieved, we conclude that people have met with their needs. (p. 81)

The major differences between McClusky's and Londoner's models is that Londoner sees the necessity of examining both goals and needs for educational planning. McClusky's framework is solely a front-end analysis, examining only individual and group needs. Londoner supposes that the simultaneous process of considering needs and goals will enable the educational gerontologist to have a better opportunity to discover te kinds of educational activities the older adult will consistently attned. (p. 84)

Londoner has attempted to explore the concepts of

instrumental and expressive orientations. He envisages instrumentally (or expressively) oriented needs as only being meaningful when they are linked with instrumentally (or expressively) oriented goals. Londoner states, "the researcher had to have some idea what the students were anticipating in the future in order to suggest what their needs were." He borrows from Talcott Parson's definition of Instrumental and expressive action orientations. Instrumental action orientation "presupposes the giveness of a goal and requires a self-evaluation or prioritization of gratificational desires. It requires knowledge of conditions necessary to attain the goal despite the desire for immediate gratification" (p. 79). For example, obtaining a university degree could be an example of an instrumental action orientation. An individual often has to forfit monetary rewards and other immediate gratifications in order to obtain a future degree. Expressive action orientation "entails that the individual organizes the flow of gratification to a present-time orientation - or "doing" the activity is itself its emotional reward" (p. 79). Painting a picture or playing a piece of music could be examples of expressive action orientations.

Londoner sharpens the distinction by emphasizing that the instrumental goals of the aged must be analyzed first, before considering either instrumental or expressive needs. He articulates that Persons in their Later Years (PLY's) have survival goals uppermost in mind to help them resolve daily coping problems. (p. 85) This is similar to McClusky's

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contention (although McClusky is focusing strictly on needs) that coping needs are fundamental and must first be satisfied prior to consideration of expressive needs. Both authors are concerned with instrumental and expressive orientations of the older adult. Londoner and McClusky are extremely concerned that the older adult survive physically and economically. They do not adhere to the position that the problems of the elderly will be solved by filling their days with only busy activities such as crocheting and playing bingo.

Various authors have carried on empirical experiments to clarify the instrumental/expressive dichotomomy. Those researchers whose findings supported a preference for instrumental activities for the older adult include Goodrow (1975) and Hiemstra (1972, 1975). On the other hand, advocates of expressive educational activity include Bauer (1975) and Burkey (1975). De Crow (no date) foresees various drawbacks in dichotomizing educational opportunity into either/or categories. Marcus's (1978) findings demonstrate that often the elderly see expressive utility in programs that are classified by researchers as instrumental. But Londoner (1978, p. 87) articulates that the apparent preference for instrumental learning opportunties for the older adult. It is interesting to note that the only courses subsidized by the Quebec Government in the Adult Education program are those that are supposedly instrumental in nature, for example "courses aimed at managing better within society in all aspects" (The Equity, 1981, p. 5).

Sociological Trends and Their
Educational Implications

Categories	Trends	Educational Implications
Increase in the Proportion of Elderly	1) By 2001 expected projection 11-13% of population 2) Rapid growth of those 80 between 1980-2000 3) Small towns fastest rate of aging during 60's & 70's	A) Need of programs for those 80 i.e. in nursing homes B) Need of more programs in small towns
Sex Differentation	1) More older men than women in areas 2) More older women than men in urban areas 3) Differences in aging process for men & women	A) Programs for men in rural areas B) Preretirement programs should emphasize sexual differences
Income Level	1) Relatively low income level of many of Canada's elderly 2) Elderly spend more of their income on basics	Instrumental or coping needs of elderly are very important
Labour Force Participation	1) General decline of labour force participation for the elderly 2) Participation of women increasing & men decreasing 3) Trend to early retirement 4) Movement to abolish mandatory retirement	A) More time for leisure or second career - education for leisure or second career

Categories	Trends	Educational Implications
Health	1) Should look at whole person, not just absence of disease 2) Elderly now live longer lives 3) Elderly are confined longer to the hospital	A) Programs should focus on prevention and whole person B) Programs to keep elderly healthy & independent
Family Life	1) Extended family – an uncommon phenomenon in Canada 2) Research shows contact between older adult and family 3) Many older adults live in "family" situation	1) Programs that offer support to families caring for the elderly 2) Programs that stress inter-generational education
Educational Level	The educational level of the elderly is lower than other age cohorts; but this level is increasing	1) Link between higher educational level and successful retirement 2) Education begets education
Leisure	1) Television, radio, & reading increase with age 2) Recent increase in physical fitness among the elderly	1) Use of television, radio, and written material for educational programs 2) Fitness programs for all social classes of older adults

Chapter III

Theories of Aging and their Educational Implications

At present, there are not established theories of educational gerontology. Instead four theories of aging have been chosen and the needs, goals, and interests of the older adult will be interpreted from each theory. After reviewing the literature of social gerontology, four theories of aging have predominated: disengagement theory, activity theory, role-loss theory, and age stratification theory. What is crucial to the critical analysis of these theories is their educational implications for the older adult. Certain guidelines have been formulated in order to examine each theory: how each theory defines old age, the philosophical background of the theory, for example, the school of thought, the aim of the theory, the limitations, and the educational implications of the theory.

Brief History of Social Gerontology

During the thirties, social gerontology emerged as a distinct discipline. The depression years focused its attention to the adjustment of the elderly to the dismal economic situation. According to Quadagno (1980, p. 69) the problems of "adjustment" were viewed within the framework of developmental psychology which envisages old age as a period of declining abilities.

Personal Adjustment in Old Age (Cavan, Ruch, Burgess, Havighurst and Goldhammer, 1949) is considered to be one of

the pioneering studies during the forties. This study linked positive adjustment to continued activity, social interaction, and participation in institutional life.

The major focus in the fifties changed from "adjustment" to the understanding of the normal processes of aging. Quadagno (p. 69) refers to a major study in social gerontology in the fifties that utilized various indices to measure "normal" aging. The study focused on three concerns: the role performance of people between 40 and 70, the psychological states and characteristics of normal adults in the same age ranges, and the relationship between performance and characteristics. The results were inconsistent. Certain results depicted no difference in interior states in spite of role changes like retirement or widowhood. The other set showed an increased withdrawal which accompanied these life changes. This withdrawal was coined the "interiorization" of the ego. This study provided a runway for the disengagement theorists of the early sixties.

Disengagement Theory

During the sixties, disengagement theory was the most disputed explanation of aging in social gerontology. The disengagement theorists. Cumming and Henry (1961) perceive aging as an

> inevitable mutual withdrawal or disengagement, resulting in decreased interaction between the aging person and others in the social system he belongs to. The process may be initiated by the individual or by others in the situation. (p. 14)

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Disengagement theory is based on the inevitability of death. Many relationships between the aging individual and other members of society are severed and those which remain are altered in quality. The individual is preparing himself and society for his death by gradually withdrawing from active societal roles. Cumming and Henry state:

> The aging person may withdraw more markedly from some classes of people while remain relatively close to others. His withdrawal may be accompanied by an increased preoccupation with himself; certain institutions in society may make this withdrawal easy for him. (p. 14)

It appears that interaction between the older adult and some classes of people are diminished but this is not the case for all relationships. Contacts with intimate kin do not diminish except when these kin are no longer available. (p. 63)

The disengagement theorists acknowledge idiosyncratic differences in the disengagement process. For example, the time at which disengagement is initiated and the rate at which it proceeds varies among individuals. In addition, the degree of qualitative change in enduring interpersonal relationships differs from person to person.

Once the disengagement process begins it becomes self-perpetuating. But, there are significant differences for men and women. Cumming and Henry state, "On the whole, men make an abrupt transition from the engaged to the disengaged state, but it is soon resolved; women have a smoother passage which lasts longer" (p. 159). Retirement for men is considered by this theory to be more traumatic and dramatic

than women. Women evidently lose their central role more slowly. They cease to be reproductive, their children leave home and finally they lose their spouse. Cumming and Henry continue, in reference to men and widowhood,

> Widowhood is a serious blow for men, especially if they do not consider remarriage. Furthermore, the completely stripped condition in which the individual has no one available-no spouse, no job and no close kin is considerably more devastating for men than for women because they are used to the mediating role. They have mediated between their husbands and their kindred, between their children and the school, between their family and the neighbourhood, whereas men have been used to conferring status on their family through their ability to relate. (p. 159)

As previously dicussed in urban areas there are many more widows than widowers. Therefore, widows possess more of the same sex companions in a similar predicament. It may be difficult to deny that women are used to mediating and have been engaged in socio-emotional roles more than men. But Cumming and Henry seem to overlook bread and butter issues. There is certainly at present a high proportion of women with very little in the way of pension benefits. Widowhood for these women can be a very traumatic experience if their economic survival is threatened by the death of their husband. With such a high proportion of working women today, the future will be a test if retirement is as difficult for them as for men.

The disengagement process may be initiated by the individual, by society or both. If the individual and society are ready for disengagement at the same time, the end result is successful disengagement. Cumming and Henry do

foresee the possibilities of disjunction between the individual and society. For example, the individual may want to disengage before society wants them to. This is supposedly prevalent among women and the result is that usually engagement is likely to continue. On the other hand, society may want the individual to disengage before he is ready. This phenomenon is more common among men and usually results in disengagement.

On the basis of these examples, it appears that society has an upper hand in the disengagement process. The institution of mandatory retirement is often forced upon the worker at the age of 65 (in many provinces of Canada). Since Cumming and Henry are structural functionalists, their theory is geared to what is functional for society. At present, economic recession and high technological growth are two variables that contribute to mandatory retirement being functional for society. Older workers retire and make room for younger workers. James J. Dowd (1975) states emphatically, "Like other structural functionalists, Cumming and Henry are unable to accept the possibility that men are forced to act - not because that act is normatively governed - but simply because they have no other alternative" (p. 116).

The functionalist perspective views the institutions of society as inter-related and sees society as engaged in the constant process of achieving stability. It is a deterministic perspective which stresses that the individual

internalizes norms and values. In other words, it is the solid structures of society that determine behavior.

Normative control is a major concept of disengagement theory. As individuals grow older they interact with others less. The less they interact, the less they are normatively controlled by others. The less normatively controlled they are, the more they become desocialized and exhibit eccentric or egocentric behavior. Normative control is defined in terms of social lifespace on the number of friends and relatives one sees per week. According to Arlie Hochschild (1976):

> Desocialization is, in a sense an "extra" mechanism which assures the inevitable process of disengagement and prevents any return to previous states of engagement. One might parenthetically argue that, if disengagement is intrinsic and inevitable, this extra social mechanism is unnecessary. It is nonetheless part of the theory. (p. 68)

One must also be critical of how normative control is measured. Older adults are not children, they have internalized social norms all their lives How can the number of visitors one encounters in a week determine normative control? Cumming and Henry utilized as indicators of social disengagement: what older adults said they did, whom they see and for how often. TAT cards were considered to be indicators of psychological disengagement. It appears that the quality of social interaction was overlooked. For example, an older adult who had numerous visitors would be considered to possess a higher social lifespace score than one who had few visitors but intense relationships with each

one.   Hoschschild states, "Without questions concerning meaning of behavior, we can only comment on the role and not the person" (p 70).

Much of the criticism of disengagement theory has attacked the substance of the theory. Hochschild instead attacks the logical connection of the theory. According to Cumming and Henry disengagement is universal, inevitable, and instrinsic. But there are variations in the form and timing of disengagement. It is not specified in the theory which aspects are universal, inevitable, and intrinsic and which are variable. Hochschild adds, "unless this is specified, we have an escape clause problem" (p. 55). For example, old engagers are said to be "unsuccessful disengagers." According to Cumming and Henry's logic, older engaged people are not evidence of the theory's lack of universality, either a person is a successful disengager or an unsuccessful disengager. The older adult can also be said to be off in his or her "timing." The data suggests that a higher propor- tion of women in their sixties have a larger "lifespace" than do women in their fifties. Cumming and Henry conclude from this data that one is a disengager on time or a disengager off time but both are "on the way" to disengagement. Hoschschild concludes "We do not need a theory that offers clear criteria for counterevidence" (p. 59.).

Disengagement theory claims two independent variables and one dependent variable. An individual's age and society's stance toward disengagement are the independent variables. Disengagement is the dependent variable. Between

the independent and dependent variables there are many
intervening variables that modify the relationship of age to
disengagement. These are said to be "sources of variation,"
in the form of disengagement. These sources of variation
include physiology, personality, type of initial engagement,
life situation and sex roles. Much of the follow-up research
has been concerned with changing these intervening variables
to the status of independent variables.

One of the weakest parts of the theory is the
characterization of disengagement as a unitary process. The
theory claims that psychological and sociological forms of
disengagement are one unitary process. This claim has been
refuted by empirical evidence. Atchley's study (1971) of
professors emeritus demonstrates that social disengagement
can occur without its psychological counterpart. Rose (1965)
also suggests that economic disengagement can preceed social
and pscyhological disengagement.

What are the educational implications of disengagement
theory? According to Stanley Cath, (1975) "Disengagement has
moved many social resources and programmers toward
diminishing resonance and reduced interaction with the
elderly" (p. 86). Although disengagement theory was only a
theory and not a policy statement Cumming and Henry should
have had more forsight of the implications of their theory.
One of the greatest pitfalls was according to Cath, the
failure to stress how mutual reinforcement of the individual
and society can be destructive. In other words, the role of

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the adult educator is to adopt a very passive stance toward the elderly.

The writer has worked as a social animator in a nursing home. One of the difficulties encountered is that many of the staff and residents were proponents of disengagement theory. The older adults admitted that they were interested in partaking in educational activities when they had first entered the nursing home. But there are only organized activities during the summer months. Since nothing is expected of the resident but going to meal and attending church services, many spent their days sleeping and looking out their windows. Lack of activity becomes a self-fulfilling prophecy. Staff on the whole were not highly educated and possessed little or no training towards the needs of the older adult. In the name of efficiency, all of the needs of the older adult are taken care of. Even for those residents who are able of doing their own laundry, no provisions are made for self-sufficiency. A common response uttered by the staff, "Mrs. B. can't go to exercise class this afternoon because she needs her afternoon sleep." This preceeding example demonstrates certain effects that the adherence to disengagement theory has on the lives of older adults.

Activity Theory

Activity theory is probably one of the most widely accepted theories in social gerontology, particularly by occupational therapists, recreation workers, social animators, and many adult educators. It was only with the

development of disengagement theory that activity theory became recognized as a distinct theory. Activity theory belongs to the school of symbolic interactionism which assumes that the meaning of life is found in social interaction.

Activity theory stresses that social activity is central to health and social well-being. If an individual is able to remain socially active, activity theory predicts that he/she will achieve a positive self-image and greater life satisfaction. Robert J. Havinghurst and Ruth Albrecht are the main advocates of activity theory. The essence of activity theory (Havinghurst, 1953) is:

> Research has established the fact that activity in a wide variety of social roles is positively related to happiness and social adjustment in old age and also that a high degree of activity in a given social role is positively related to happiness and social adjustment (p. 309).

Between the age of 50 and 75 an individual is deprived of several social roles or at least they are reduced. A set of habits constitute a role. Havinghurst (1953-4) suggest "to change roles easily and increase or reduce activity in a given role requires the personal quality which we call role flexibility" (p. 309).

Havinghurst spells out the various possible role changes encountered by the older adult. The roles of homemaker and church goer can be intensified for both men and women. The role of worker in which the individual is denied money and status from his job is reduced. The role of parents can be reduced as early as their forties.

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Particularly the role of spouse for women is often lost by death. Commonly, club or association membership declines after the age of 60. Certain roles can be intensified by special effort such as a role of citizen, family member, friend, neighbour, and member of a social club. Grandparent may be a new role that entails full enjoyment and little responsibility.

The main correlation established by activity theory is a positive relationship between activity and life satisfaction. In fact it is difficult to refute its prescriptions. If this theory is examined critically it appears to be similar to advice from a doctor or psychologist, "Keep busy and you'll remain happy."

According to Dowd, (1975) "Activity theory is less an actual theory complete with defined concepts and empirically verifiable propositions than it is a well-intentioned but thoroughly value-laden response to disengagement theory" (p. 105). It appears that there is merit to Dowd's criticism of activity theory being value-laden. When describing the average-work day of an individual prior to retirement Havinghurst states, "Work got him up in the morning, structured his day for him and sent him home tired but satisfied" (p. 310). In addition, Havinghurst adds, "The satisfaction of creative activity, a new experience which he once got from his work, he may, now that he is retired, get from hobbies" (p. 310). It appears that Havinghurst's proposition for the older adult to engage in hobbies to fill his/her empty hours does not give the older adult the option of continuing to

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work and not retiring. This theory does not question society's attitude towards compulsory retirement.

The role of the professional should be to develop role flexibility in the individual approximately at the age of 50. Role flexibility entails a reasonably successful experience in a variety of roles during the middle years. What Havinghurst is referring to is a middle aged person cultivating diversified interests. For example. a carpenter may join a political discussion group and a politician may engage in carpentry. In more global terms, Havinghurst is advocating preparation for retirement. But he has specified this preparation in a narrower sense - role flexibilty. Havinghurst states referring to the capacity of role flexibility:

> The problem for social science and for adult education is to learn the conditions under which the capacity may be acquired and to discover ways of helping all kinds of people to increase it. (p. 314)

It is difficult to refute Havinghurst's claim for the middle aged to prepare for their retirement. Role flexibility would be an asset for an individual to cope with his/her retirement years. But many older adults may want to continue their careers. For example, a teacher may want to continue teaching on a volunteer basis or for monetary reward. In other words, not everyone will want to pursue diversified interests. In our highly technological society, role flexibility would have to become and educational goal well before one reaches the middle years. In fact with the

shortage of jobs today, not everyone is able to obtain a position related to their educational and career aspirations. Role flexibility should be a goal for the elementary and secondary levels, long before one reaches the middle years.

Similar to the disengagement theorists Havinghurst's concerns ignore the economic reality of many older adults. When he makes such statements, "Residents of the northern part of the United States might cultivate role flexibility by taking a winter vacation annually, and going to a variety of warm places, depending upon taste and pocketbook" (p. 311). This type of solution may be a very beneficial solution for preretirement planning for the middle and upper classes. In brief, Havinghurst's prescriptions of expanding and diversifying one's interests are only advantageous to those with financial security during retirement. Preparation for retirement is one type of educational program that will be discussed in chapter five. One must keep in mind that the economic reality of the older adult is an extremely important variable in preparation for retirement. Londoner and McClusky have explained the importance of recognizing the instrumental needs of the older adult in the preceeding chapter.

Role-loss Theory

According to Irving Rosow (1974) unlike earlier status changes in American life, people are not effectively socialized to old age. His analysis demonstrates "that norms for the aged are indeed weak and that the aged are subject to only negligible socializing" (p. xiii). He perceives "social

increases with age and as a result "large concentrations of older adults living together would maximize social opportunities, chances for interaction, and the prospect of flourishing local groups" (p. 162).

Rosow is interested in "protecting the elderly from the invidious judgments of others" (p. 163). He also limits the older adults' participation in the larger society. However, Rosow also says that the elderly are viewed in stereotypes both by younger groups and themselves. How does Rosow's proposal of socially homogeneous groups of elderly living together, (who do possess stereotyped attitudes toward themselves) help promote successful socialization to old age? In addition, if it is important for younger groups in society to possess a positive attitude toward the older adult - is not daily interaction important between the young and the old? Certain minority groups in society, like the handicapped, are demanding equal participation in all institutions of the larger society. In other words, the trend today is toward integration in the larger society instead of segregated workshops and institutions. (It is not to be assumed that the elderly are a minority group.) But for the handicapped, one of their greatest obstacles is the rest of society's negative attitude towards them. If the rest of society is to possess positive attitudes toward the elderly - integration indeed seems possible.

Rosow supports his proposal by Arlie Hochschild's participant observation of a small public housing project of predominantly working-class widows. (p. 169) Hochschild does

not describe the process by which local norms develop nor focus her research primarily on socialization. But Rosow's functions of peer group are present: group support, new group membership, new role set, role specification, positive reference group, insulation of members, qualified role members, and new self images. In addition, Hochschild observed the weakening of kinship and other external ties.

Public housing for the elderly has numerous economic, social, cultural and psychological benefits. The writer has been involved with a Senior's Transportation project, whereby, most of the users and volunteers lived in a local senior's residence. She was living in such proximity to other users of the project that her privacy was constantly being invaded. Since her position was replaced by an individual who lived outside the residence the same problems were not encountered.

Rosow criticizes disengagement and activity theories for seeking happiness and adjustment as goals. But one cannot help but think that Rosow in stressing the need of norms to govern the behavior of the older adult, implies that these would improve their devalued status and enhance their self-esteem. On the other hand, Neugarten (Marshall, 1978-79 p. 54) argues that behavior in the aged is under strong influence of norms:

> For any social group it can be demonstrated
> that norms and age expectations act as a
> system of social controls, as prods and
> brakes upon behavior in some instances
> hastening an event, in others, delaying it.
> (p. 54)

Normative control is an important ingredient of disengagement, activity, and role-loss theories. For Cumming and Henry normative control was discussed as an extra mechanism that reinforced the process of disengagement, defined by an individual's social lifespace. Havinghurst's perception of normative control for the older adult is similar to that of the middle-aged. During the middle years one should develop role flexibility so that retirement can be filled with hobbies and interests to replace working. For Rosow, normatively controlled old age does not exist, but it is none the less viewed as normal. (Marshall, 1978-79, p. 54)

It appears that Rosow is seeking a rite of passage for the older adult to be effectively socialized into old age. Retirement, widowhood, and institutionalization usually arise after social old age has been initiated and only validate it. (p. 22) The concept of rites of passage is interesting but not really relevant for North American society. Anthropologists have argued that there are no rites of passage for adolescents in our society either, as with other age cohorts. Therefore, the elderly are not the only age group that do not undergo public observances of status changes.

Preretirement programs could foster an easier transition and preparation for old age. But at present these programs are not widespread. Rosow cites Thompson (1958) in refernces to preretirement education which has "little effect unless the worker already has a positive attitude toward retirement

and looks forward to it, often because of worker health" (Rosow, p. 26).

Rosow is adamant that nothing is done to prepare the worker for a distinctive retirement role. Interestingly, he places reference to a "phasing out" retirement program in a footnote. Instead of an abrupt retirement it is gradually reduced over a three to five year period. Individuals move from full time employment through progressive stages of part-time work. Rosow states, "These programs seem to offer relatively successful transitions to retirement and permit a gradual transition to it, similar to the gradual domestic tapering-off of women." (p. 127) In Northhampton, Massachusets, a division of Kallmorgen Corporation has instituted a "phased retirement" program. Employees in their last year, can take with full pay from one day a week at first, to four days at the end, for volunteer work in the community. (Psychology Today, October, 1982, p. 22 & 26)

This approach to retirement could have important educational implications. It may respond to the needs, interests, and goals of the older adult, who would no longer be faced with an abrupt retirement. This could be an opportunity to develop what Havighurst refers to as role flexibility by engaging in community work or even pursuing educational endeavours.

This proposal wasn't considered by Rosow to be pertinent to his thesis for it was only included in a footnote. On the basis of the preceeding intrepretation of Rosow's theory, it appears he envisages education for the older adult to be set

apart from other age groups. Such programs as Eldherhostel
and Peer Counselling for the Elderly would be pertinent
examples. The Elderhostel movement enables older adults to
board for a nominal fee and take intensified courses with
their peers in university environments across North America.
The Leonard Davis School of Gerontology, at the University of
California, possesses a program entitled "Peer Counselling
for the Elderly," supported by state funds. Individual and
group counselling for the elderly is provided by trained
paraprofessionals, who are between 55 and 81 years of age.
The philosophy behind such a program emphasizes that when
older adults are service providers, this overcomes certain
resistance that many of the elderly have toward accepting
social services. (Modern Maturity, 1979, p. 25)

Rosow's theory has another ramifications for the educa-
tional planner. For the older adult who goes back to
university, it could be a rather overwhelming experience –
particularly the bureauracy of the university environment.
There are no norms or few role models to govern their
behavior. Perhaps, there is the need of counsellors
specially trained in working with the older adult to help
with registration, course change, libraries etc.

Age Stratification Theory

Matilda White Riley (1971) includes minority group
theory (Barron, 1953) and subculture theory (Rose, 1965)
under the larger framework of age stratification theory. The
elderly are considered a minority group because they are

highly visible, they are discriminated against and stereotypes exist about them (Breen, 1960). Rose (1965) suggests the elderly form a subculture of their own, since they do have common interests and are excluded from significant interaction with others. In addition, group consciousness can be expected to develop in the future. It must be added at this point, that these claims have been refuted. Streib (1963) insists that older adults have no group consciousness and instead are a statistical aggregate. Since most people eventually become old, the elderly are not a minority group whose membership is exclusive and permanent.

Age stratification theory differs from other theories because it centers upon society as a whole which is divided into various age strata similar to social claas. What is pertinent to this theory is how an individual's location within the changing age structure influences his behavior and attitudes. This theory adheres to the school of thought that the solid structures of society allocates individuals in a division of labour according to age.

There are two dimensions that locate an individual in the age structure of society: a life course dimension and a historical dimensions. The life course dimension includes biological, psychological, and sociological components. According to Riley, "Chronological age is of interest to us, not intrinsically, but only because it can serve as an approximate indicant of personal (that is biological, psychological, and social) experience - and this experience carries with it varying possibilities of behavior and

attitudes" (p. 89). In brief, individuals at 'the same stage of life have much in common. For example, most men at the age of 65, have lived for the same number of years and are expected to live for another 13 years (life expectancy for men of 65 is 13.9 years). Many have experienced the roles of husband, father, grandfather and even great-grandfather.

The historical dimension refers to the period of history in which an individual lives. Riley defines cohort as people who were born at the same time and share a common historical and environmental past, present and future. (p. 90) Canadians born in 1910 are presently 72 years of age. These individuals share in common various historical events: World War I, the roaring twenties, the depression, World War II, the cultural revolution of the sixties, the October crisis, and the recession. Riley points out that people who were born at different historical times, since they differ in age, experience the historical situation differently. (p. 90) It is agreed that an individual born in 1910 would have experienced the sixties differently than an individual born in 1945. But social class is also an important variable. The current recession does not have an effect on all 70 year old individuals (as it does on all age sectors of the population). But a 70 year old surviving on the old age pension and supplement has much more to get nervous about when the federal government advocated six and five increases on pensions than one who lives on interest from past savings.

Age stratification theory focuses on the entire age-

differentiated society not only the elderly. Gerontological literature has reported widespread exchanges of material support between elderly generations of parents and their adult offspring. According to Riley, Foner and Associates, (1968) the flow of support between aged parents and their adult offspring appears to be two-directional, either from parent to child or from child to parent as need and opportunity dictate. In the United states, the proportions of older people who give help to their offspring appear to exceed the proportions who receive help from their offspring. (Shanas, 1966; Streib 1965, Streib and Thompson, 1960) This refutes the popular myth that older adults are dependent on their children. Even if a third generation is also considered, the flow of material support between middle-aged parents also appears to be directed toward their offspring. (Foner, 1969) It is not that middle-aged individuals are neglecting their parents but rather that they are preoccupied with the needs of their own children.

An interesting result of this analysis is that middle-aged parents in channelling their material resources to their own children, also limit their resources for the future years. But according to Riley's (1971) analysis, lack of family support for aged parents is not neglect, "but an expression of normative agreement among all generations about the direction in which aid should flow" (p. 92).

Rosow has commented on age similarity and homogenity. But his analysis does not include other age cohorts. Gerontological literature has pointed out that outside of the

family older adults tend (although by no means exclusively) to have friends who are similar to themselves in status characteristics - notably age - that signal mutuality of experiences, tastes, or values. (Made, 1969; Riley et al, 1968) Since age stratification theory extends its scope to other age cohorts, Riley utilizes sociological literature to support his analysis. Homophily (or similarity among friends in status or values) is a widespread phenomenon that encompasses all age sectors of society, not only the elderly. (Hess, 1971; Lazarsfeld & Merton, 1954) By broadening our scope to other age cohorts certain similarities between age strata can be drawn.

Education is a noteworthy example of the significance of cohort flow for cross-sectional differences among age strata. (Riley et al, 1968) During the twentieth century rapid change in education has left its mark on successive cohorts of young people, setting the age strata apart from one another. (Riley, 1971, p. 97) This has already been discussed in chapter two. In 1976, over half the elderly had completed elementary school, about one third had attended high school, and 2.6% possessed a university degree. On the other hand, more than half of the population between 15 and 64 were high school graduates, and 6.8% had university degrees.

Age stratification is not a static theory. There are new cohorts that can come along and society can change its educational institutions. Historically the older adult was

deeply respected for his life experience and knowledge. Riley (1971) projects, "the information gap between the young and not so young is deepening, creating pressures to change the entire structure of education if people beyond the earliest years are to maintain competitive equality" (p. 97).

Age stratification theory sensitizes the educational programmer to the effects educational and societal changes have on the entire age strata of society. In Quebec, the French language has become an increasing part of the curriculum for anglophone school age children. Today's unilingual anglophone older adult often feels powerless in a French province. One must keep in mind the rather low level of educational attainment of many older adults. Their previous education had only paid lip service to the French language. More attempts should be made to foster the French language for the elderly by way of informal courses in senior centers and local school boards in order that older adults be able to maintain competitive equality with younger age cohorts. The same argument could be made for computer technology or any other major change in the educational system in the last century.

Summary of Chapter Three

	Disengagement	Activity	Role-loss	Age Stratification
Assumptions of Theory	Individual & society preparing for death by gradually withdrawing	Lost roles are functional for individual & society	Lost role need to be replaced Need of norms governing elderly	Must look at at entire age strata of society
Type of Theory	Psychological & Sociological	Psychological & Sociological	Sociological	Sociological
Perspective	Functionalist	Symbolic Interactionism	Functionalist	Functionalist
Definition of Old Age	Time of decline	Continuation of middle age	Normless, roleless status passage	Mobility through the age strata of society
Educational Implications	Passive stance -can lead to very negative and apathetic attitude	Develop role flexibility in middle age. Implications for pre-retirement education & keeping the elderly busy	Elderhostel, Seniors helping seniors, Special needs of older Preretirement	The elderly should maintain competitive equality with other age sectors of society through continuing education

Chapter IV

Limitations and Obstacles to Older Adult's Participation in Educational Programms

Chapter four examines the limitations and obstacles that deter the older adult in being a participant in educational programs. First, the characteristics of older adults who are consumers of educational programs will be presented. Secondly, the various reasons why the elderly do not usually participate in educational endeavours will be explored. A theoretical position, in keeping with the four predominant theories of aging will attempt to offer explanations of why older adults are largely not participants. Social-psychological and economic barriers will be examined. In addition, the predominant view of mental decline in the older adult will be refuted.

The Characteristics of Older Adults Who Are Consumers of Educational Opportunities

In the United States approximately two percent of individuals aged 65 and over participate in some form of educational opportunity. (Marcus, 1978) This percentage refers to both formal and nonformal educational endeavours: such as, regularly scheduled study groups, discussion groups, and lecture series sponsored by universities, churches, labour unions, employers, public school systems, libraries

and community centers. In Quebec, participation in educational activities also decreases with age. Sixteen percent of women and nine percent of men, 55 years of age and over are participants. (Sondage sur les adultes quebecois, 1980, p. 15)

In regard to the United States, Louis Harris and Associates (1975) caution that for those individuals without high school leaving, the percentage of participants is less than one percent. But for college graduates the percentage of older adult participants increases to more than seven percent.

A certain portrait of the older adult participant in educational programs emerges from the literature. The older adult apperas to be a "joiner". He/she is more likely to be a member of a community organization or agency. (Hooper & March, 1978) Phelps, Enderson, and Peterson (1976) report that older adults who are already members of seniors' organizations are most likely to attend a college-sponsored event such as workshops, classes or cultural activities.

Although the data on sex breakdown of participants tends to be inconsistent, most studies suggest that there are more female participants than male. Bynum, Cooper and Acuff (1978) conclude that more older adult women participate than older adult men, more than the proportion of females in the older population. Marcus (1978) states that female participants are in the same proportion as their existence in the older population. Hooper and March (1978) found a higher

proportion of men than were represented in the sample of their study. Goodrow (1975) reports that the older adult males are reluctant to engage in educational programs that are embarrasing or threatening to their self-images. The preponderance of married individuals among elder student groups is suggestive of the effect of intimate relationships upon self-esteem and risk-taking in old age. (Hooper & March, 1978)

In addition to being a female, married "joiner", the older adult student tends to be gregarious (Hooper & March, 1978; March, Hooper, & Baum, 1977), possess higher income (Bynum et al, 1978), spend greater amount of time reading and tend to perceive their health as better and retire earlier. (Bynum et al, 1978)

The older adult educational participant usually possesses a higher educational level than the median, especially some college. (Bynum et al, 1978; Fisher, 1979; Graney & Hayes, 1976; Hooper & March, 1978; March, Hooper & Baum, 1977) Robinson (1972) reports that current older adult participants were more likely to have participated in adult educational activities ten years ealier and believed that their most admired friends participated in adult educational activities. One interesting finding of Graney and Hayes's (1976, pp. 353-357) research is the Zugarnik effect. This phenomenon refers to persons who are interrupted during the process of accomplishing a task, possess a need for closure by a heightened interest and warenesss related to the uncompleted task. In relation to education, those older

adults who possessed some high school or college, (but had not completed their degrees or diplomas) expressed slightly more interest in pursuing educational opportunities than those who had completed their degrees or diplomas. Blum and Jarvik (1974) also caution us not to regard previous educational level as absolute. These researchers concluded that it is not the number of years of schooling per se that is important in influencing attitudes. Instead, those individuals who received more education tend to continue lifestyles that foster maintenance of mental activity.

Those attending classes and workshops in the later years appear to be largely female, better educated than average, and mostly middle class. But, so far only formal and nonformal educational opportunities have been examined. Hiemstra (1976) expands the concept of learning and learning project to be more encompassing. Learning is defined as the "acquisition of knowlege, attitudes, or skills and the mastery of behavior in which facts, ideas, or concepts are made available for the individual's use" (p. 333). Hiemstra adopted Tough's (1971) learning project notion, as a "series of clearly related learning efforts adding to at least seven hours of effort within a six-month period" (p. 333). Entertainment and recreational activities wre excluded from the analysis. The findings indicated that the older adult (average age 68.11) engaged in an average of 325 hours or 3.3. projects each year. The older adult planned most of his/her own learning, engaged in learning mostly for enjoy-

ment and didn't use experts very often for a source of infor-
mation. (p. 339). Contrary to our previous examination of
participation informal and nonformal educational
opportunities, it appears that the less-educated, blue
collar, and lower class persons engaged in many hours of
learning. But the upper-middle and upper class, college-
graduated, and white collar older adult did carry out more
learning projects. Hiemstra concludes that educators should
be sensitive to the amount of self-directed independent
learning pursued by/ the older adult outside of institutional
and community structures. In other words, Hiemstra questions
the role of the educational programmer in designing settings
and programs that could possibly enable the older adults
self-directed and independent learning to be more efficient.

Reasons for Participation

A portrait of the older adult learner has just been
depicted. It is also necessary to examine the reasons or
motivations why older adults participate in educational
programs. Peterson (1981) states, "that educational
participation is related to some specific, positive push
rather than simply the absence of any barriers to participa-
tion" (p. 250). Educational courses are often taken by the
older adult because of an academic intellecutal interest and
to expand one's general knowledge. (Harris et al, 1975;
Kingston, 1982; Marcus, 1978) Social interaction or meeting
other people in a stimulating environment are considered to
be important motivating factors. (Cross, 1979; Fisher, 1979;

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Harris et al, 1975) Disengagement, activity, and role-loss theories have pointed out how roles are discarded in old age and the shrinking of the older adult's social world. Therefore, some older adults seek out new situations in which they can interact with other individuals. According to Marcus (1978), those individuals with the greatest need are not the typical participants. But Birren and Woodruff (1973) suggest that educational programs can alleviate problems facing the elderly and prevent some of potential difficulties if these programs are well designed and undertaken at appropriate times. The accessibility of the sponsoring institution is considered to be of prime importance. Peterson (1981, p. 248) reports that churches provide the most educational programs, junior and community colleges and universities are the second major source, followed by adult education and correspondence schools. Hooper and March (1978) suggest that participants of a college non-credit course are likely to attend a college where their children have attended or who had friends bring them there for the first time. Community or junior colleges appear to be very influential in attracting the elderly. (Bolton, 1976; Bradley & Cooper, 1969; Edelson, 1978; Feller, 1973; Hirsch, 1978; Hoffman, 1978) Community and junior colleges often are smaller in size and more attuned to serving the needs of the community.

Reasons for Lack of Participation

Theoretical Position

In keeping with our four predominant theories of aging, each theory can be interpreted to give reasons why older adults do not participate in educational programs. McPherson and Kozlik (1980, pp. 113-122) utilize various theories of aging: disengagement, continuity and age stratification to attempt to explain Canadian leisure patterns by age. This approach will be utilized in reference to disengagement, activity, role-loss, and age stratification theories in order to give reasons why older adults do not participate in educational opportunities. McClusky's & Londoner's examination of the needs, goals, and interests of the elderly will also be interpreted to explain lack of participation.

Those attending classes in their later years appear to be a small percentage of the better educated, middle class elderly. Atchley (1977, pp. 25-26) argues that individual and/or institutionalized disengagement occurs and hence aging leads to decreased social participation. In order to test this assumption empirically, large-scale longitudinal surveys would be needed. In other words, a particular aged cohort would be chosen and their participation in formal educational activity would be measured at specific times over a duration of many years to determine the impact of disengagement. A particular longitudinal study measuring the impact of disengagement on participation in educational activities has

not been found. But it appears as previously discussed, that those older adults who do participate are the more educated middle class, who were more likely to have participated in formal adult education programs ten years earlier (Robinson, 1972). Therefore it remains an empirical question whether disengagement theory provides an explanation for lack of participation in educational pursuits.

Activity theory supposes that role flexibility should be acquired during middle age years in order that an older adult can assume new roles during retirement and become a successful ager. Lack of participation would mean that role flexibility was not developed. Studies would be needed to measure whether the development of role flexibility during middle age is positively correlated with educational participation after retirement.

Role-loss theory dictates that the later years are characterized as a time when there are no particular roles or norms to guide the behavior of the older adult. In respect to participation in educational activities, the role of student for the older adult is not widespread. Although the success story of a particular older adult who received a university degree may reach the headlines of the Senior's column of the newspaper, these are few in number. Interestingly, Graney and Hayes (1976) report that older adults need knowledge of how to reenter the educational system and accounts of how other older adults succeeded in higher education.

Age stratification theory is perpetuated by a system of

age grading whereby opportunities, interactions, and role responsibilities are related to chornological age. According to B. McPherson and Kozlik (1980, p. 121), in reference to leisure participation, age discrimination or ageism may restrict the opportunity set and define the normative standards in the leisure domain. In regard to participation in educational activities by age categories, it may not seem appropriate behavior for an older adult to attend classes because this may be behavior associated with younger aged cohorts. In addition, the elderly may not have placed high value on formal learning in the first place. Lack of opportunity and restrictive behavioral norms based on societal perceptions of age-appropriate behavior may operate to reduce participation in educational pursuits.

According to McClusky's, (1974, p. 340) margin theory of needs, lack of participation in educational opportunities can also be explained. Many older adults are engaged in a struggle to provide for the minimal necessities of every day living. This struggle may leave little margin of time and energy for the pursuit of educational activities. In keeping with Londoner's (1978) proposal of looking at the goals and needs of the older adult, it would appear that the elderly are not making educational choices for optimizing their personal gratifications and needs.

Social-Psychological and Economic Barriers

Research has revealed specific social-psychological and

of older adults in educational programs. Since the elderly have been away from the educational system for a long period of time, they often lack confidence in their ability to learn (Knowles, 1970) or their capacity to study. (Sondage sur les adultes quebecois, 1980, p. 15) Anderson (1955) discusses the routine of complacency which governs the lives of many older adults. They have often solved many of their lives' problems and there is no great pressure for personal or vocational success. Other reasons include "feeling too old" to attend the educational system, (March et al, 1977) health reasons, (Sondage ... quebecois, p. 15) fear of not succeeding, (Burkhill and Schaie, 1975; Houle, 1975) and a high percentage of functional illiteracy among those 65 and over (Ecklund, 1969). Havinghurst (1976) coins this lack of confidence and complacency as a "mindset" against formal education.

Graney and Hayes (1976) report a study that weighs the relative importance of various barriers to the pursuit of higher education. For those, interested in college courses the most important barriers were information and costs. On the other hand, for uninterested individuals the greatest barriers were attitudinal: apathy and negative self concept. This study recommended the need of public information and outreach programs. Knowledge is needed on how to reenter the educational system and about the experiences of older adults who have succeeded in higher education. Interestingly, this study relates to the findings of Baum, Hooper and March (1977). In a guest-student program at the University of

Wisconsin, four students were hired as ombudsmen to increase enrollment. Door-to-door transportation and help with registration were provided. As a result enrollment of guest students increased by 64% This program could be considered to fulfill the recommendations of providing public information and outreach as suggested by Graney and hayes. This encouraging finding can also be linked to the writer's suggested implications of role-loss theory. There is the need of norms to foster the integration of older adults into the formal educational milieu. In the case of Baum et al's (1977), ombudsmen provided the mediating link between the older adult population and the university environment.

Brahce (1976, p. 57) coins the occurrence of the learning progression phenomenon in his evaluation of the Post-retirement Education Model Courses in Detroit area colleges. Older adults, both men and women of varied educational backgrounds, sought more advanced educational stimuli; once they have overcome their hesitancy to enter the college classroom. This hesitancy is what Havinghurst (1976) refers to as a fear of failure or "mindset" against formal education. Individuals with only a few years of schooling and those with some college work tend to become self-motivated to pursue more complex courses of study or skill, once they have overcome this mindset against formal education.

According to Brahce and Hunter, (1971, p. 272) the acceptance of the next challenge apparently follows the educative needs suggested by McClusky (1974). For example,

those older adults who entered the educational system at the "coping level" enrolled in survival courses to help them understand social and consumer protection services. later, many of those older adults enrolled in mini-courses dealing with politics, letter-writing, and cultural appreciation at various community colleges. It was also reported that when a pilot drama program was introduced, many older adults dropped out. The reasons attributed to the failure of this program were: many felt that they were being motivated too quickly, some felt that their reading skills were not good enough for oral reading of parts or not being given enough encouragement by the instructor. For the more educated older adult (having completed some high school or college), it appeared that it proved to be beneficial, if they first mastered course material designed for people who had been out of school for a long period of time before pursuing academic degrees. Brahce and Hunter believe that older adults can move from age-segregated learning environments to age-integrated environments once they have self-confidence. Perhaps, Rosow's prescription (1974) of age homophily or age-segregated settings for older adults is only a preliminary step in gaining self-confidence in order to integrate into age-integrated settings.

Many universities and community colleges offer free or cut-rate tuitions for the older adult. Phelps, Enderson and Peterson (1976) state that free tuition appears to be little inducement to bring older adults to the educational milieu. Although costs are reported as a barrier for those who are

already interested in pursuing college courses. (Graney & Hayes, 1976) Chelsvig and Timmermann (1979) found that nearly one in three institutions of higher learning in the United States had adotped a free or reduced tuition. In a follow-up study, Chelsvig and Timmermann (1982) further investigated the type and strength of the commitment of institutions of higher learning to educational programming for older adults. This commitment was defined by evaluating support services available including simplified registration, counseling, special programs, organized older student groups, and out-reach activities. The findings suggest a general lack of support services in institutions that have adopted a free or reduced tuition. The researchers concluded, "If a program is available but no effort is made to promote its availability or to provide support services necessary to facilitate entrance, it will most likely be radically underutilized" (p. 274).

One of the greatest barriers to educational participation for the rural elederly is lack of transportation. Monk (1977, pp. 149-150) reports that transportation is the most serious problem, followed by loneliness, unemployment and poverty. The rural older adult also possesses a lack of knowledge about services and mistrust of any publicly sponsored program. Perhaps, outreach programs and organized transportation would be incentives to increasing the participation of rural older adults. Outreach programs could include television, radio, or newspaper advertising of

courses made available at local senior centres. C.J. Karcher
and B.C. Karcher (1980) point out that the rural church must
be recognized as an important structure available for
cooperation with higher education in service to the rural
elderly.

Predominant View of Mental Decline in the Older Adult

Society has long cherished the belief that old age is
characterized by the irreversible process of mental and
physical decline. Current findings tend to refute the past
myth of mental decline in older adults. Research evidence
suggests that older adults are so capable of learning as
younger cohorts. (Arenberg and Robertson, 1974; Baltes and
Labouvie, 1973; Baltes and Schaie, 1973; Labouvie-Vief and
Gonda, 1976; Panicucci and Labouvie-Vief, 1975; Woodruff and
Walsh, 1975). However, Labouvie-Vief (1978, p. 233)
distinguishes types of learning that are age sensitive.
Cognitive tests that assess an individual's accumulation of
verbal skills and general information that are well embedded
in a matrix of meaning are found to improve throughout
adulthood and into later life. On the other hand, older
adults tend to do more poorly on tests dealing with the
perception of relationships among abstract symbols and to the
effective use of information under the conditions of time
restriction and in highly abstract contexts.

Earlier cross-sectional studies measured so called
"learning decrements" in two or more adult age groups of
different individuals born at different times. These studies

usually possessed research designs that made a lower level of educational attainment in the older adult appear to be a decline in individual intelligence or the ability to learn in old age. (Baltes and Schaie, 1973; Eisdorfer, 1969)

Longitudinal studies measure the same group of individuals over an extended period of time. Blum, Jarvik, and Clark (1970) studied intelligence of individuals aged 60 and over for 20 years. The results indicated that intelligence remained at about the same level across this time period. In other major longitudinal studies, cognitive changes were examined in relation to distance from death instead of chronological age. These findings demonstrated that the majority of older adults exhibit a steady level of intellectual functioning throughout their lives. It is only during the few years precipitating death that major declines were obvious often accompanied by major physiological deteoriation such as arteriovascular and cerebrovascular diseases. (Eisdorfer and Wilkie, 1973; Palmore and Cleveland, 1976; Riegal and Riegal, 1972)

There are other problems encountered in research studies concerning intellectual functioniong and the older adult. Learning is often defined on how it can be best measured in the laboratory setting. The older adult may also possess a lack of experience with laboratory tasks. One study reported that the low level of intellectual functioning on highly speeded tests might reflect the elderly persons lack of experience with such tasks. (Hoyer, Labouvie, and Baltes, 1973) The older adult's learning may also be hampered by

raised anxiety levels (Eisdorfer, Nowlin, & Wilkie, 1971), and possess reluctance to guess when not sure. (Birkhill and Schaie, 1975) In multiple-choice tests, the reluctance to guess can be detrimental to one's overall score. Learning, in the case of the older adult, is also susceptible to inter- ference especially conditions that oppose established habits or preconceived ideas. (Arenberg and Robertson, 1974) The elderly are more influenced by the usefulness of the material to be learned and also become frustrated by the deprivation of success. (Hand, 1973).

Many researchers have also relied upon "captive audiences" such as older adults who live in seniors' residences or nursing homes. (Labouvie-Vief, 1978, p. 237) These older adults often represent the more fragile part of the population who no longer live in the community. This is similar to researchers relying heavily upon captive college audiences as their subjects. Many social-psychological studies are slanted toward how college students behave. It could also be suggested that a good part of social gerontological findings portray a more fragile picture of older adult behavior than what is reality. Although there may not be any direct correlation between chronological age and mental decline, there are certain physiological changes that occur during later life. Wass and West (1977, p. 409) report physiological changes based on various research studies. There is a reduction in sensory acuity. Audio and visual stimuli should be of a greater magnitude in order to

produce a sensation. (Birren, 1964) Russell (1969) states that more difficulty is experienced in tolerating rapid or indistinct enunciation; as well as being able to tolerate noise. The adult educator should be sensitive to the possible visual and auditory deprivation experienced by some older adults. Kingston (1982, p. 49) proposes that educators and reading specialists should be familiar with optical aids, talking books, etc. in helping the older adult reader. Goodrow (1975) suggests that emphasizing interpersonal communication, small group interplay or discussion groups rather than heavy reliance on written materials or textbooks can compensate for a decline in visual acuity. There is also a decline in physical strength and some older adults experience chronic fatigue. Reactive speed appears to be affected by vascular and endocrine changes and loss of muscle tone.

It is crucial that appropriate standards are sought when measuring the intellectual performance of the older adult. Researchers should be senstive to physiological changes and other laboratory conditions that may influence an older adult's performance. There are also social-psychological and environmental variables that appear to influence the elderly's intellectual performance. After 60 years of age, retirement not aging may be a major cause of ubiquitous decline in cognitive functioning. (Baltes and Labouvie, 1973; Labouvie-Vief et al, 1974) Older adults improved their congitive performance when their self-concepts improved. (Ismael and Labouvie-Vief, 1976) In a fourteen-year

longitudinal study, social isolation was the lifestyle indicator strongly predictive of intellectual losses. (Schaie and Gribbin, 1975) Physical exercise habits, may also be predictive of cognitive declines. Botwinick and Thompson stress that age differences in psychomotour speed may be related to poor exercise habits than to age. Lack of physical exercise may also be implicated in the decline of measures of abstract intelligence (Barry et al, 1966; Powell and Pohndorf, 1971). On the basis of these findings, one can conclude that so-called mental deteoriation or decline in the older adult is indeed a myth. The educational programmer should be sensitive to the physiological, psychological and social development of the older adult and the environmental factors that optimize his/her learning, when designing programs and learning environments for individuals in their later years.

Learning Environment

Chapter four has explored the various limitations and obstacles that hinder the older adult's learning potential and deter him/her from becoming a participant in educational programs. The elderly, indeed, are not a homogeneous group. Their physiologial, psychological, social, and cultural backgrounds are extremely diversified. But the findings of the studies reported in this chapter do provide a rough guideline in designing learning environments for the older adult.

In general, educational programs should be close to the life experience of the older adult. Knowles (1970) has

stressed the importance of the accumulated experience of the elderly and of the need of techniques to tap their experience. The educator should also acknowledge the self-directed and independent learning in which many older adults pursue on their own.

There appears an urgent need to educate the general public that the predominant view of mental decline in older adults is indeed a myth. Adult educators, continuing education coordinators, community organizers and teachers should be made aware of the field of education and aging and the learning potential of the older adult. Knowles (1970) perceives the role of teacher as a facilitator not a transmitter of knowledge. The teacher should be more of a resource person, who recognizes the older adult as a self-directing person, being aided in diagnosing his/her own needs. In fact, the elderly should ideally be involved in the planning, conducting, and evaluation of their own learning. The resource person should be sensitive to the possibility that older adults may possess negative self-concepts and lack confidence in their abilities. The teacher should be gradual in his/her approach and try not to overwhelm the learner. Since older adults may be susceptible to overarousal, the facilitator should be supportive, encouraging, and present students with evidence of their progress. Problems that arise should be dealt with immediately because unlearning a response is difficult for the elderly. It could be of benefit if the teacher provided

an outline indicating pertinent points of discussion. New information should be presented in a relaxing pace and sufficient time should be required to complete tasks. Brahce and Hunter (1971) suggest short sessions or frequent breaks in long sessions. Arenberg and Robertson (1974) prefer that learning is spaced over several weeks rather than being intensive.

In the classroom visual and auditory aids are necessary. Enlargement of written materials, overhead projectors, "talking" books, transparencies, may compensate for a decline of visual acuity. The acoustics of the room should be adequate and interpersonal communication such as small group discussion should be promoted. Although certain learning aids would be beneficial, research tends to support the contention that the elderly can be accommodated in the typical college classroom without major curricular and administrative adjustments. (Kingston, 1982) This does not refute the necessity of support services such as simplified registration, counseling, special programs, or organized student groups to provide a mediating link between the older adult and his/her learning environment. (Chelsvig & Timmermann, 1982) The educational programmer could also try to offer courses in the community instead of the usual on-campus night courses. This may reduce travel time, since transportation is often a major problem for the older adult. Senior centres, church halls, and empty public schools may provide more accessible alternatives.

Examples of Educational Programs

Chapter five will critically review Elderhostel and preretirement programs in Pontiac County. as two examples of educational programs for the older adult.

The Elderhostel Program

Based on the European youth-hostel model, the Elderhostel program offers short-term, college-level courses for the older adult over the age of 60 on university campuses mostly during the summer months. The social activist, Martin P. Knowlton founded Elderhostel in 1975 including on a network of five New Hampshire colleges. In 1981, participation grew to 300,000 older adults involving 300 colleges. Courses were offered in fifty states in the United States, Ontario, the Maritimes and Quebec, Great Britain, Denmark, Sweden, Finland, and Norway. (The Citizen, March 16, 1982, p. 47)

Elderhostel does not attempt to integrate the elderly into the regular university program. Seniors are encouraged to attend programs away from and live in college dormitories. Provisions, too are made for commuters. According to Harry Imbleau (1982), a University of Ottawa Continuing Education Coordinator, "The main purpose of Elderhostel is to get people from the outside to come and live together for a

period" (p. 37). For example. at the University of Ottawa's first program in 1982, there were 70 live-in students and 31 seniors from the Ottawa area. Fifteen individuals had to be turned away.

Elderhostel has a uniform maximum tuition for all summer programs. In 1982, this weekly maximum tuition was 180 dollars. This tuition includes room and board, all classes, as well as extracurricular activities.

The philosophy behind the Elderhostel program suggests that retirement is often followed by a withdrawal syndrome accompanied by feelings of uselessness. Martin P. Knowlton (1977) advocates that this withdrawal syndrome is reversible. In other words, a few weeks of mental stimulation can reverse the withdrawal process. He substantiates his claim on the basis of the 1975 evaluation by Elderhostel participants. Many stated that their aches and pains disappeared, they possessed more energy and a general sense of well-being. Knowlton coins this sense of well-being as "Post-Elderhostel Euphoria" (p. 89) or a supposed acute heightening of perception and sense of identity. It is difficult to evaluate this claim, since it is based only on an evaluation of the first year of Elderhostel. But such positive responses should not be rejected immediately. One can easily relate a return home from a meeting. conference or course with feelings of renewed energy or a "new lease on life".

Elderhostel is considered to be a liberal arts program. Many of the 1975 participants stated that the nature of the courses offered were more pertinent to the success of the

program than the format in which they were offered. In fact, over half of the participants chose a particular campus on the basis of courses being offered. (Knowlton, p. 92)

Colleges are asked to provide courses that have intellectual content and quality equal to their average college offering. No credits are given for following a course. Admission to a particular course is based on a lifetime enthusiasm rather than experience in traditional study. Supposedly, no course can be designed particularly for the elderly. In 1983, the course offerings for Canadian Summer Elderhostel included approximately one hundred and sixty courses, of which only five were geared specifically to the aging process. The most popular courses offered in Canada in 1983 were: history. natural history. literature, computers, art and art history and music. It appears that the reasons for enrolling in Elderhostel is similar to (Harris et al, 1975; Kingston, 1982; Marcus, 1978) desire for intellectual stimulation, interest is in no way considered to be a program organized to alleviate problems facing the elderly.

In general, Elderhostel does not espouse McClusky's (1974) coping needs or Londern's (1978) instrumental orientation. Instead its liberal arts orientation promotes the Aristotelian concepts of the "good life" and "higher faculties" (Knowlton, p. 92). Elderhostel may not satisfy McClusky's (1974) coping, contributive, or influence needs, but it appears to realize both expressive needs, (engaging in

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activities for their own sake) and transcendence needs (activities designed to continue to achieve self-fulfillment). More precisely, Elderhostel observes Moody's (1976) self-actualization stage in his analysis of educational programs for older adults. Moody suggests old, age is a distinctive stage of the life cycle. He implies that that elderly can nourish their psychological, and spiritual development through exposure to the ideas of the humanities and the social sciences.

Both disengagement theory and Knowlton agree that old age is a time of withdrawal. Disengagement theory views old age as a period of irreversible withdrawal. But Knowlton stresses that this process of withdrawal is reversible through the mental stimulation provided by Elderhostel. Activity theory assumes one is a successful ager by keeping busy - which could be exploring diversified interests or doing anything to fill one's time. Elderhostel's focus is much more specific in promoting mental stimulation through the usage of the "higher faculties" or the Aristotlean concept of the liberal arts.

Generally, Elderhostel students are learning with their age peers. This satisfies Rosow's (1974) recommendation of age homophily. There is also a growing trend to integrate Elderhostel students in courses with regular students. In 1981 non-summer programs accounted for five percent of the total enrollment of 37,000. (Elderhostel Annual Report 1981, p. 4)

Age stratification theory has stressed that age

not been found. But it appears as previously discussed, that those older adults who do participate are the more educated middle class, who were more likely to have participated in formal adult education programs ten years earlier (Robinson, 1972) Therefore it remains an empirical question whether disengagement theory provides an explanation for lack of participation in educational pursuits.

Activity theory supposes that role flexibility should be acquired during middle age years in order than older adult can assume new roles during retirement and become a successful ager. Lack of participation would mean that role flexibility was not developed. Studies would be needed to measure whether the development of role flexibility during middle age is positively correlated with educational participation after retirement.

Role-loss theory dictates that the later years are characterized as a time when there are no particular roles or norms to guide the behavior of the older adult. In respect to participation in educational activities, the role of student for the older adult is not widespread. Although the success story of a particular older adult who received a university degree may reach the headlines of the Senior's column of the newspaper, these are few in number. Interestingly, Graney and Hayes (1976) report that older adults need knowledge of how to reenter the educational system and accounts of how other older adults succeeded in higher education.

Age stratification theory is perpetuated by a system of

Provisions, too are made for commuters. According to Harry Imbleau (1982), a University of Ottawa Continuing Education Coordinator, "The main purpose of Elderhostel is to get people from the outside to come and live together for a period" (p. 37). For example, at the University of Ottawa's first program in 1982, there were 70 live-in students and 31 seniors from the Ottawa area. Fifteen individuals had to be turned away.

Elderhostel has a uniform maximum tuition for all summer programs. In 1982, this weekly maximum tuition was 180 dollars. This tuition includes room and board, all classes, as well as extracurricular activities.

The philosophy behind the Elderhostel program suggests that retirement is often followed by a withdrawal syndrome accompanied by feelings of uselessness. Martin P. Knowlton (1977) advocates that this withdrawal syndrome is reversible. In other words, a few weeks of mental stimulation can reverse the withdrawal process. He substantiates his claim on the basis of the 1975 evaluation by Elderhostel participants. Many stated that their aches and pains disappeared, they possessed more energy and a general sense of well-being. Knowlton coins this sense of well-being as "Post-Elderhostel Euphoria" (p. 89) or a supposed acute heightening of perception and sense of identity. It is difficult to evaluate this claim, since it is based only on an evaluation of the first year of Elderhostel. But such positive responses should not be rejected immediately. One can easily relate a return home from a meeting, conference or course with feelings of renewed

discrimination exists in our society. Since the Elderhostel program is composed of mostly of older adult learners, it is considered appropriate behavior for the students of Elderhostel to participate in educational activities. Mental stimulation is one way for the eldery to maintain competitive equality with other age cohorts through participation in Elderhostel.

Who are the consumers of the Elderhostel program? According to Knowlton (1979), the participants of 1975 possessed a median age of 68 and average age of 70. Three out of four were female and very few single men attended. The majority of participants were above average in income, activity, and education: 19% were former professionals, 51% were white-collar workers, nine percent were housewives and two percent claimed blue-collar status. In fact, 70% had some college education. (pp.89-91) As previously discussed, Elderhostel students are similar to the general picture of most elderly students: mostly female members of the middle class with some college education.

In brief, the Elderhostel program is not geared toward the particular needs of the elderly, such as, course content or special provisions in the university environment. This supports Kingston's (1982) research that the elderly can be accomodated in the typical college classroom without major curricular and administrative adjustments.

A Preretirement Program

According to C. Kasworm and J.W. Wetzel (1981, p. 304)

retirement has commonly been defined as a cessation from full-time, lifelong occupational activity. Compulsory retirement has been criticized as a form of age discrimination in a youth-oriented society. Yet, many older adults do retire at age 65 and an increasing number seek earlier retirement.

Preretirement education is a program preparing for older adult for his/her cessation from the occupational role and the continuing aging process. Such a program may include those who have also retired and did not have the opportunity to partake of such a program prior to retirement. In discussing the educational implications of activity and role-loss theories, preretirement education has been highlighted. Havinghurst (1953) has claimed that the middle aged should prepare for the retirement by developing role flexibility. Rosow (1974) suggests that preretirement education could foster an easier transition and preparation for old age.

It is claimed that in the United States less than 50% of American workers receive some limited form of preparation for retirement program. Abraham Monk (1977, p. 278) reveals that this is a very misleading calculation, which could include a one-shot presentation or introduction to the company pension plan. In private industry, employers are often reluctant to support preretirement programs because they may claim they constitute an intrusion into the private life of the employee. More importantly, these programs could bring to light a company's poor pension plan. It appears

that comprehensive preparation for retirement programs do not reach more than 10% of the urban American labor force. (Monk, pp. 279-280) Comprehensive preretirement programs would include other topics besides financial planning such as health, legal issues, recreation, education, nutrition, exercise etc.

Since 1981, preretirement programs have been sponsored by the CLSC (centre locale service communitaire) in Pontiac County in northwestern Quebec. These courses have been offered in the municipalities of Fort Coulonge. Campbell's Bay, 'Calumet Island and Shawville. The percentage of older adults, aged 65 and older in Pontiac County increased from 10.5% in 1971 to 12.1% in 1981; this is 37.5% more older adults than the province of Quebec which claims 8.8%. Generally, there are more male adults than females, aged 55 and older with the exception of the Shawville and Fort Coulonge areas. (Census, 1981) This is in keeping with the general findings that there are more men than women in the elderly population in most rural areas.

The preparation for retirement was organized in Campbell's Bay and Calumet Island in collaboration with the community organizer at the CLSC and the local Golden Age Clubs. The initiative originated with the community organizer, who began approaching local seniors groups in the winter of 1981. Peterson (1981, p. 204) specifies the importance of the credibility of the sponsoring institution. He recommends cosponsorship with an established agency or institution, recruitment through existing roups or

organizations, or access to participants through present or former students. In this case, the community organizer sought potential participation through the local seniors groups.

These sessions were addressed to retired seniors and to people who were approaching retirement, approximately aged 55 and over. The general purpose of this program was to better prepare individuals for retirement and to inform seniors on a variety of topics relevant to their position in the lifecycle. There were two courses offered simultaneously, one in English in Campbell's Bay at the seniors' apartments and the other in French at the Senior's Club on Calumet Island. These eight sessions were free of charge and took place one evening per week for a duration of an hour and a half beginning September 1981.

The introductory session was presented by the community organizer, who discussed the objectives of the program and the various proposed subjects. A film involving the process of aging was also included in the first session. Various speakers were invited to address the seniors on their field of expertise which included a CLSC doctor, nurse, homemaker, and a social counsellor, an administrator of a nursing home, a manager of seniors' apartments, a legal aid lawyer, a bank manager, and a recrealogist. The topics discussed included health, helping seniors in their own homes, legal issues, diet, recreation, education, and physical fitness. Many of the subjects were of the "how to" nature, for example. how to

plan one's budget, how to eat properly, and how to occupy one's time after retirement. Much discussion centred around the goal of prevention, such as how exercise and diet promote health. The various community support services available to the senior to enable him to be an independent functioning member of the community were fully explored; for example. nurses who make home visits and homemakers who perform light housekeeping and shopping.

In Campbell's Bay, 27 individuals were registered, of which four were men and 23 were women. The age range varied: five were under 64, eight were from 65 to 69, 11 were from 70 to 79, and three were 80 and over. The participants learned about the sessions from the Golden Age Club, the local paper, Church bulletins, and from another person. This is in keeping with what Phelps et al (1976) have reported that older adults who are members of seniors' organizations are most likely to attend educational programs.

On Calumet Island, 24 individuals registered, of which nine were men and 14 were women. The age breakdown included, nine individuals less than 64, six in the 65 to 69 age category, and eight in the 70 to 79 age group. The major sources of advertisement included in descending order the Golden Age Club, the Church Bulletin, the community radio station, another person, and the local newspaper.

Participation in both sessions varied. In Campbell's Bay, the number of participants fluctuated between a maximum of 32 and a minimum of 15 with an average of 21.6 individuals per session. The most popular subjects rated by the older

adults in descending order were: legal issues, helping seniors in their own homes, the introductory session including the movie, housing, financial issues, and health. On Calumet Island, participation varied from a maximum of 25 individuals to a minimum of nine, with an average of 15.1 per session. The most popular topics in descending order included health, housing, legal, and financial issues.

At the end of both sessions, the participants responded to a questionnaire, in order that the community organizer could evaluate the program. The results combined both Calumet Island and Campbell's Bay sessions, including a total of 22 respondents. Nine were francophone from Calumet Island and 13 were anglophone from Campbell's Bay. Seventeen of the seniors rated the sessions as being "good" in quality. Fifteen individuals expressed that the preretirement program changed their habits of everyday living, especially in regard to nutrition, budgeting, physical fitness, and leisure activities. It was reported that there could have been more discussion in the areas of health and education. The majority of respondents found that the sessions were of appropriate length of time. Seventeen seniors expressed an interest to meet again to discuss the development of services and activities for older adults in the region. In fact, several of the participants did meet after the program, and two popular education courses did result.

The main objectives of the CLSC's in Quebec since their inception in the early seventies are information, education,

and prevention of the general public in the areas of physical and social health. These preretirement sessions seemed to fulfill these objectives. Disengagement theory has referred to the shrinking of an individual's social world after retirement. In a sense, this preretirement program did prepare the older adult for the possibility of a declining social world by informing seniors of the various community support systems that are available such as visiting homemakers and nurses, transportation services and the possibility of Meals on Wheels. Activity theory is also exposed. Role flexibility is considered a desirable goal in preparing the older adult to reinvolve himself with new types of groups and acquire a new social identity. The older adult is given suggestions and recommendations of "how to occupy one's time after retirement" and "how to develop new recreational activities." Role-loss theory has suggested that old age is characterized by a stage in human development devoid of norms and roles for the older adult. These sessions did inform the older adult of various options for life after retirment such as various leisure activities, volunteer positions etc. Peer support and group education was also fostered. According to Monk (1977) "groups are a more economical form of transmitting information — their primary value lies in the fact, that they help the reticient, the shy, and the confused to receive support from his peers" (p. 271). In addition, preretirement programs located away from the workplace, give the older adult the opportunity to look critically at his/her pension plan and financial

position. Age stratification theory has indicated the "ageism" that exists in our society. These sessions did inform the elderly participants of their rights and various services available to them. This knowledge could permit the older adult to stand a better chance of competitive equality with other age cohorts.

This preretirement program particularly stressed McClusky's (1974) coping needs and Londoner's (1978) instrumental action orientation through discussion of such topics as finances, health, nutrition, housing, legal issues and homemaker services. Expressive needs were highlighted by such topics as leisure activities and physical fitness. Contributive needs may have been met, by fostering volunteer work and ecnouraging the older adults to initiate popular education courses after the termination of the program. Such possibilities as establishing of Meals on Wheels and Youth/Seniors Project (adolescents helping the elderly with minimal tasks in their homes) were fully explored.

The community organizer did encourage the participants to join the AQDR - Association quebecoise pour la defense des retraites et preretraites, which is a Quebec-wide political action group for the defense of the rights of older adults. This group has been instrumental in abolishing mandatory retirement at age 65 in Quebec. The participants were not interested in joining the AQDR. McClusky's (1974) influence needs suggest activities that encourage the older adult to participate in the decision-making process of society in

order to improve their situation and that of others. Perhaps, it is difficult for residents of Pontiac County to identify with Quebec organizations and groups. Pontiac County is located geographically very close to the Ontario border and there are numerous ties between the Pontiac and Ontario. Also the participants of the program may not have been interested in joining a political group. It remains an empirical question whether this program successfully met the transcendence needs of the participants - by encouraging older adults to continue to achieve self-fulfillment.

Studies of preretirement programs such as Scheibe (1968) and Ash (1966) have demonstrated that workers who attended such programs displayed better adjustment after retirement. Monk (p. 278) points out that there is a bias in such studies. The majority of participants in pre-retirement programs are usually mindful, alert and positively inclined towards retirement and have already started planning in the first place. In reference to the participants in Pontiac County, the community organizer claimed that these individuals were mostly middle class, members of seniors' organizations, who were slightly more educated than the general population.

Pontiac County, like other rural areas possesses more men than women in the older adult population. But the majority of participants in the preretirement sessions' are mostly women. This phenomenon is also apparent for other age sectors of the population in regard to community education. Although husbands and mates are strongly encouraged to attend

prenatal classes, many classes are composed mostly of women. This also holds true for nutrition programs. Perhaps, in Pontiac County it is not considered to be "male behavior" to attend public education programs. Goodrow has also discussed that males are reluctant to engage in educational programs that are embarrassing or threatening to their self-images. In addition, women also tend to be more educated than men. For example, 20.2% women in comparison to 14.9% men aged 15 and over possessed some post-secondary education in Pontiac County. (Census, 1976) As previously discussed, higher educational attainment is positively correlated with continuing education.

Generally, continuing education programs are difficult to initiate in Pontiac County. It is not unusual to hear, "Why do we need prenatal courses? Women have been giving birth since the beginning of time." The same attitude may be reflective of preretirement programs - "What do we need to know about growing old?". As previously discussed transportation is a major problem in rural areas. It often takes much enthusiasm about an educational program to motivate individuals to organize a car pool. In addition, there is often a mistrust of social services as well as a widespread belief that the CLSC is a form of welfare.

This program did not question the validity of retirement as an institution of society. There appeared to be no discussion of continuing to work as an option. Monk (p. 279) suggests that preretirement programs should give

consideration to new career interests and occupational retraining. Furthermore, Monk (p. 280) stresses too much attention is often given to psychological well-being and social adjustment.

The disengagement theorists (Cumming and Henry, 1961) have stressed that the role of worker is more important to most men than to women. Levy (1981) has speculated that women never really retire and maintain their homemaker role past the age of 65. In fact, retirement was considered mainly a male institution until recent years. With women's increased labor force participation, Kasworm and Wetzel (1981, p. 310) reveal that women are experiencing role alternatives and transitions and may be experiencing greater stress, role confusion, alienation, and depression. In addition, women are presently more likely to live alone and longer than men, they probably earned less money, and have lower pension benefits or no private pension at all. It is important for the community organizer or adult educator to be aware of the possible differences in the aging process for men and women. Kasworm and Wetzel successfully conclude their objectives for preretirement programs, "It is now time to broaden our horizons and consider both men and women's aging patterns, work and nonwork transitions, and the formal and informal learning resources of the community" (p. 312).

Chapter Six

Proposed Framework for the Design of Educational Programs

Chapter six will establish a framework for the design of educational programming for the older adult. This framework will be briefly compared to current recommendations of the Commission d'etude sur la formation des adultes.

The goal of this thesis is to develop a framework for the design of educational programs for the older adult. A framework is a basic structure consisting of pertinent factors that should be included in deliberate planning for educational programs or organized plans for learning. It was considered important to develop a framework for educational programming for certain reasons. Theories of aging have existed since the Great Depression; but it appears there has been no attempt to synthesize these theories or analyze their educational implications. Disengagement theory has advanced a very passive stance toward the older adult. Activity theory has often promoted that the older adult fill his time with "busy" activities. These two theories have shaped much of our attitudes toward the elderly during the past 30 years. It is also necessary to fuse the relationship between theory and practice: how various general principles have been influential in developing programs or how certain theories could improve programs. A framework could be beneficial in evaluating existing educational programs and may lay groundwork in instituting improvements in future programs.

A Framework for the Design of Educational Programs

The position promoted is that the older adult should possess the opportunity to choose to participate in educational programs, to continue to work for monetary reward or, on a volunteer basis, or to enjoy meaningful leisure. This paper deals with only the opportunity to participate in educational programs or organized plans for learning.

Many colleges or universities would state that they were making educational programs accessible to the older adult by simply offering reduced or free tuition. But emperical studies have indicated that free tuition, along, does not promote participation. Ideally, educational programs should be made accessible to all seniors - not just fairly educated, middle-class, married women who are members of community organizations and enjoy a lifestyle that fosters mental activity.

The proposed framework would take into account the various pertinent factors the educational programmer, the continuing education coordinator, or community organizer should consider important when designing educational programs for the older adult.

A Framework for the Design of Educational Programs for the Older Adult

Objectives: 1.   the older adult should have a <u>choice</u> to participate in formal educational programs.

          2.   educational programs developed on appropriate criteria should be accessible to <u>all</u> older adults.

Assumptions 1.   educational programs can be preventative, ameliorative, social, or expand one's knowledge.

          2.   Educational programs are one alternative to enable older adults to remain healthy, independent, contributing members of society.

Statement: When designing educational programs for the older adult, the educational programmer should take into account the following pertinent factors.

Social, cultural, economic, and education position of the older
adult.

$\downarrow$

Certain sociological trends pertaining to the older adult

$\downarrow$

Needs, goals, and interests of the older adult

$\downarrow$

Defined by the older adult

Interpreted and redefined
by the educational
programmer

$\downarrow$

Who should have knowledge
of the various theories of
aging

$\downarrow$

Who should be aware of the
limitations and obstacles
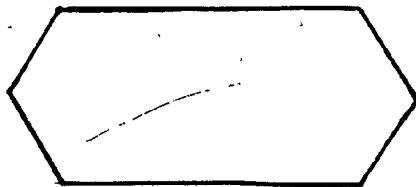that limit participation

$\downarrow$

Who should have critical
knowledge of existing
programs

Types of Programs

Re-entry

Job Retraining

Intellectual

Instrumental or Coping

Preventative &
Ameliorative

Sociocultural

Increasing Accessibility to Programs

Information

Changing
Negative Image
of Older Adult

Organized
Transportation
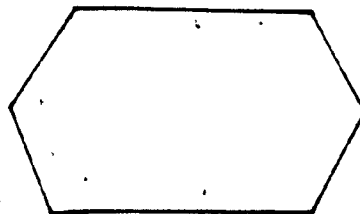
Outreach

Free or Reduced Tuition

Support Services

Teachers Should be Aware

Independent
Learning
Outside
Classroom

Possible
Social-
Psychological
Problems

Physiological
changes

Learning
Potential

Learning
Aids

Auditory

Visual

Methodology

Tap Life
Experience

Frequent
Breaks

Deal with
Problems
Immediately

Allow Student
Input

Outline Main
Ideas

Gradual & Relaxing
Approach

Explanation of Framework

The proposed framework has assumed that educational programs can be preventative, ameliorative, social, or expand one's knowledge. The introduction has specified Peterson's p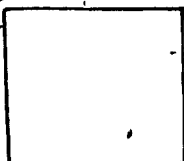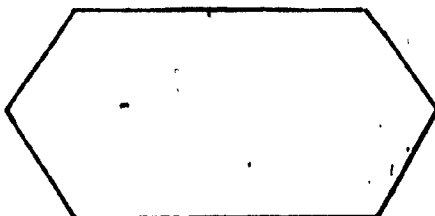osition that educationa programs are preventative and ameliorative. Research has revaled that the primary factors motivating older adults to participate in educational programs were to expand their knowledge or for social reasons, such as to be with othes in a stimulating environment. Elderhostel has claimed to reverse the withdrawal syndrome accompanying retirement through mental stimulation, utilization of the "higher faculties," or the expansion of knowledge. Preretirement programs have demonstrated the preventative and ameliorative nature of educational programs - how the older adult can remain healthy by learning about physicaly fitness and nutrition.

McClusky (1974) has forwarded that educational programs should respond to the contributive needs of the older adult. In other words, participation in educational programs is one alternative of how the elderly can remain healthy, independent, contributing members of society.

The elderly are not a homogeneous group. Their physiological, psychological, economic, and cultural backgrounds are extremely diversified. But after studying various statistics pertaining to the older adult, certain trends emerge that can provide educational programmer with present, past, and future indicators concerning the sociological position of the elderly. For example,

statistics point out the relatively low income levels of many of Canada's elderly. Educational programmers can respond to this societal need, by creating programs that are instrumental in nature or demonstrate to seniors how to survive on a very limited budget. Job retraining too may enable the elder adult an opportunity to establish a second career or work at a part-time position to supplement his/her pension income.

It was not the purpose of this thesis to go to the field and ask the older adults how they determined their own needs, interests, and goals in regard to educational programs. Instead, statistics were examined, certain theoretical positions were evaluated, and empirical studies were summarized.

Education programs for the elderly should be more than just "needs" centred. Instead, programs should take into account the needs, goals, and interests defined by the older adult interpreted and redefined by the educational programmer. McClusky's (1974) hierarchical system of needs has provided a useful outline for the development of educational programs. McClusky's range of needs include coping, expressive, contributive, influence, and transcendence needs. Coping needs are the most basic and refer to basic educational skills, fitness and health, and economic self-sufficiency. Londoner (1978) proposes that it is first important to identify the goals of the older adult in order to determine the needs. He articulates that the

elderly's instrumental or survival goals are of primary concern. Research demonstrate that the interests of the older adult do not fall neatly into instrumental or expressive categories, but that both should be included.

Six categories of educational programs have been included to respond to the needs, goals, and interests of the older adult: re-entry, instrumental or coping, preventative and ameliorative, socio-cultural, intellectual, and job retraining programs. The categories of programs are inscribed around a geometric figure, which does not intend to weight he importance of each category or consider them in a hierarchical fashion. The various programs are relevant to the older adult, according to his/her needs, goals, and interests. Re-entry programs refer to possibly age segregated learning situations whereby the elderly can overcome his/her mindset against formal education by taking a "refresher" course of basic study skills. Instrumental or coping programs include numerical and reading literacy programs. Preretirement programs would be considered as preventative and ameliorative programs. Sociocultural programs would respond to expressive needs, interests, and goals or doing activities for their own sake, i.e. crafts, music, etc. Elderhostel would comprise an example of an intellectual program. Job retraining could prepare an older adult for a second career or for a volunteer position. Each category of programs is by no means mutually exclusive. Fitness programs could be instrumental, preventative or sociocultural.

sociocultural.

The educational programmer should possess a knowledge of the various theories of aging and their educational implications. Programs may not exist because of a very narrow understanding of disengagement theory. On the other hand, disengagement theory has acknowledged the shrinking of an individual's social world after retirement. Familiarity of this factor has been indicated in preretirement programs in Pontiac County. The older adult can prepare for the possibility of a declining social environment by knowledge of the various community support systems available.

The educational programmer may be confronted by other professionals, the elderly themselves, and/or the general public who believe that educational expenditure for the older adult is not a worthwhile investment. Even professionals may adhere to the position of mental deteoriation in the elderly. Therefore, the educational programmer should be aware of the various limitations and obstacles that prohibit participation in educational opportunities.

In addition, the educational programmer should possess critical knowledge of existing programs. For example, a community organizer developing preretirement programs should seek out existing models and critically evaluate their merits and shortcomings.

After critically examining the literature dealing with the various limitations and obstacles prohibiting participation, it appears there are six ways of increasing accessibility to educational programs. Information may

include informing the general public as to the various program options available as well as knowledge of how to reenter a particular institution or educational system. Graney and Hayes (1976) have reported that information is a barrier for older adults interested in college courses. Outreach programs could include television, radio, or newspaper advertising. Courses cosponsored through local senior clubs or churches may increase credibility of a particular educational program. Karcher and B.C. Karcher (1980) recognize the importance of the church particularly in rural areas. Research has revealed that the elderly individuals least likely to participate in educational programs are mostly male, rural, non-married, less-educated, members of the lower class. Educational programmers should identify the factors that limit their participation and attempt to uncover their needs, goals, and interests.

Colleges and universities often offer free tuition to the older adult. In Quebec, local school boards permit seniors to enroll in courses at half the cost of regular students. Free or reduced tuition is important to many older adults who survive on a restricted budget. But Chelsvig and Timmermann (1979) have pointed out that free or reduced tuition alone provides little inducement for the older adult to participate in educational programs. They advocate that support services such as simplified registration, counselling, organized older student groups etc. provide a better indicator of an educational institution's commitment to the older adult.

Organized transportation is particularly important in rural areas. The continuing education coordinator could advertise that car pools are being organized along with course information, in local newspapers or radio stations. This would make lack of transportation less a barrier for potential rural participants. The educational programmer could attempt to alter the negative image of older adults as consumers of educational programs when advertising courses - images of older adults as students could be utilized or knowledge of successful elderly learners could be disclosed to the general public. It is important that the educational programmer seriously consider each method of increasing accessibility of programs to the older adult population and utilize the methods most appropriate to his/her situation.

In a sense, the educational programmer or continuing education coordinator should be a resource person to prospective teachers of older adults. Teachers should be informed of the vast learning potential of the elderly and the most appropriate learning aids and methodology available to maximize this learning potential.

The teacher or facilitator should recognize the independent self-directed learning in which many older adults partake outside of the conventional classroom. Since many of the elderly have been away from the school situation for many years, they may possess negative self-concepts, and lack of confidence in their learning abilities or other related social-psychological problems. The teacher should be aware and sensitive to the possibility of those potential problems.

Current research findings refute the myth of mental decline in the older adult. Teachers should be aware of the emerging field of learning and the older adult and be familiar with areas of learning that are age-specific. Knowledge, too, of the physiological changes that occur during old age are crucial. Research indicates that ready-available learning aids can supplement the loss of auditory and visual acuity (the most reported problems) and maximize the older adults comfort in the everyday classroom.

The methodology adopted by the teacher can also maximize the older adult's learning potential. Elderly students are not "blank slates;" their life experience is usually vast and plentiful. The teacher should be a resource person who allows much input from the students and knows techniques to tap their life experiences. Since learning may be hampered by raised anxiety levels (Eisdorfer, Nowlin, & Wilkie, 1971) the teacher should proceed in a gradual and relaxing manner. Outlining central points for discussion will provide the older student with an overview of salient ideas to be promoted in a discussion. Problems should be dealt with immediately, since learning is often susceptible to interference or preconceived ideas. (Arenberg and Robertson, 1974) Relatively short sessions or frequent breaks in long sessions will give the older adult student less opportunity to be susceptible to fatigue.

Since an empirical study was not undertaken to identify the needs, goals, and interests of the older adult, the

proposed framework was based solely upon a critical examination of the literature. Therefore, it is quite possible that one can identify other pertinent factors to be included in the framework.

It was not the intention of this thesis to envisage the role of student for the older adult as a panacea for all problems that beset the elderly. Instead, the goals promoted are that the educational programs are accessible to <u>all</u> seniors, and that the older adult would make an informed choice whether or not to participate.

The Jean Commission

Finally, in order to know if the proposed framework has any relevance to present-day Quebec, the Commission d'etude sur la formation des adultes or more commonly the Jean Commission will be briefly compared to the framework. The Jean Commission will only be discussed at the level of principles without delving into its political structures. "L'education permanente" or lifelong education is being promoted so that all age groups of society will have a right to education during the entire life cycle. This calls for a removal of barriers or decompartmentalizing of segments of life devoted to education, work and leisure. Although the development of human potential is being sought; adult education is not being envisaged as a solution for the evils of society. The Jean Commisssion is attempting to democratize adult education or make it accessible to all adults regardless of class, sex, or ethnic origin. Therefore, the goals are quite similar to the objectives of this thesis.

The issue of adult education is explored comprehensively in the Jean Commission, of which education for the older adult constitutes only a small ingredient. The aging process is perceived as a social process that varies individually and is much influenced by social-environmental factors. This definition is similar to how aging is defined throughout this paper.

There are eight recommendations applicable to those approaching retirement and the older adult; six of which are

approaching retirement and the older adult; six of which are in agreement with the proposed framework. Old age is not considered synonymous with mandatory retirement by the Commissoin. Job retraining is considered important for new types of careers. In addition, the older adult should have access to training for volunteer positions. During the discussion of types of educational programs in the proposed framework - job retraining for volunteer positions or monetary reward is strongly advocated.

The Jean Commission recommends that efficient means be developed to inform older adults of existing educational opportunities. This refers both to the "information" and "outreach" components of increasing accessibility to educational programs. The Commissioh proposes that educational activities take into account the availability, the capacity and reality of old age. This should be accomplished by finding suitable educational practices, methodology, content, location, timetables, and equipment. This thesis has stressed how educational programs should respond to the needs, goals and interests of the elderly. It has emphasized how educational programs should be aware of the reality of being an older adult and how the theory and practice of education best be geared to this reality. Physical fitness, health, and nutrition are promoted which relates to the importance of the instrumental needs, goals, and interests of the elderly. The Jean Commission recognizes the elderly as educational resources, carriers of oral tradition and witnesses and vehicles of local history. The

proposed framework stresses the importance of the life experience that the older adult brings to the learning situation. But the Commission pushes this component a step further by advocating that older adults assume more active roles in the learning process.

There are two areas suggested in the Jean Commission not present in this thesis, the issue of popular education and distance education. It was discussed in the <u>Document de Travail</u> (1981, pp. 176-177) that popular education organizations are innovative, flexible, non-academic and more attuned to the changing needs of the community. These organizations often lack sufficient funding. The recommendation promotes easier accessibility to government funding for popular education groups involved with the elderly.

Finally, it was suggested that distance education including correspondance courses take into account the present situation of the older adult. This recommendation could easily meet the needs of the less mobile, housebound older adult as well as those living in rural areas - where transportation especially during Canadian winters can be an almost insurmountable barrier. (Recommendations 27-34, 1982, p. 157) This would give older adults the opportunity to study in their own homes and at their own times.

Conclusion

A framework for the design of educational programming for the older adult has been established. The proposed framework does not call for major administrative and curricular changes in the various institutions and organizations involved in providing educational programs for the older adult. During a time of vast educational cutbacks at every level, a grandiose transformation of the entire system would prove to be extremely costly. Although the Jean Commission calls for major reforms in the field of adult education, it appears that some of its recommendations are applicable to the proposed framework.

In brief, the framework takes into account pertinent factors which an educational programmer should address when designing plans for learning for the older adult. It is hoped that adherence to the proposed framework will facilitate the careful analysis of adult education situations as they arise. This framework outlines the wide range of factors that should be taken into consideration when designing adult education programs. We are however cognizant of the fact that conditions for their implementation change from one place to another depending on the human agency and social system through which they will be translated into practice. In other words we should always remember that to be of practical use, "what is designed at the end must be governed by understandings of the milieus within which it is to be enacted." (Reid, 1979)

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