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# Older Baby Boomers seeking collegiate degrees: Developmental influences on educational and vocational aspirations

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**Older Baby Boomers seeking collegiate degrees:  
Developmental influences on educational and vocational aspirations**

by

Jane L. Schaefer

A dissertation submitted to the graduate faculty  
in partial fulfillment of the requirements for the degree of  
DOCTOR OF PHILOSOPHY

Major: Education (Educational Leadership)

Program of Study Committee:

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Ames, Iowa

2009

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## DEDICATION

I dedicate the completion of my Ph.D. degree and the effort of this doctoral dissertation to those who brought me life.

To my parents, Leonard and LaVern Schaefer, who raised me in their home and to Dr. Barbara Markey, who raised me up in hope.

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**ABSTRACT**

Several national trends are converging to impact adult education today. First, the increasing presence of adults in higher education is accentuated by the expansive Baby Boom generation who are demanding greater access to the higher education system in the United States. Second, regarding workforce and economic development in the 21<sup>st</sup> century, employers in many industries are experiencing a workforce shortage in both numbers and skill levels of employees (Schultz, 2001; Stein, 2000). Even though four out of five Baby Boomers desire to continue working beyond typical retirement age, many will require upgraded skills and credentials (Freedman, 2005b). A third significant trend impacting adult education is longer life expectancy—age 77 today compared to age 47 in 1900 (Zeiss, 2006). The resulting longer life after traditional retirement age has encouraged older adults to participate in activities that involve new experiences, contributions to society, and learning.

We need a deeper understanding of how adult learners—particularly those who are at or near traditional retirement age—access institutions of higher education, experience successful learning in their higher education endeavors, and plan to utilize their college education in their remaining work-lives. The purpose of this phenomenological study is to explore the experiences of degree-seeking, adult learners—specifically, nine Older Baby Boomers (OBB) born between 1946 and 1958 and enrolled in a Midwestern university—to understand how psychosocial, cognitive, and spiritual dimensions of adult development influenced both their transformative learning experiences in higher education and their future vocational aspirations.

Persistent patterns of findings emerged from the data, including, but not limited to, the following: adult learner characteristics and reasons for enrollment; higher education support needs; adult transformative learning; self-identified cognitive, psychosocial, and spiritual development; vocational concerns of meaning, purpose, and service; and spiritual influences on future aspirations. These findings reveal the essence of the phenomenon of older adults pursuing higher education degrees, as perceived by these OBB participants, to be a self-identified transformative process resulting in improved learner self-efficacy, and acquired within a supportive, adult-friendly higher education environment which enabled students to successfully transition not only toward degree completion and ensuing career enhancements, but toward meaningful vocational aspirations grounded in personal spiritual beliefs.

This complex statement engenders numerous possibilities to explore in the alternate dissertation format which includes three chapters of findings submitted to scholarly journals for publication. Each journal article centers on an overarching research question relevant to the original proposed study and is framed within one portion of Nancy Schlossberg's transition model—moving in, moving through, and moving out from college. The first article addresses the student experience of OBB transitioning back into college. The second article examines the learning experience (and consequential transformation) of OBB students as they move through college. The third article explores OBB students' future aspirations beyond college, including the impact of spirituality on their vocational and retirement plans.

Higher education must respond to adult learners' support needs, learning preferences, and vocational tendencies toward service-related encore careers. By helping

older adult students prepare for careers about people, purpose, and community, “colleges will capture a new population of students to serve, will help millions of people find greater significance and purpose in life, and will help sustain America’s strong economy” (Zeiss, 2006, p. 40).

## CHAPTER 1. INTRODUCTION

Most of us personally know and have been influenced by members of the “Baby Boom” generation. Those individuals, currently age 45–63, are our parents, grandparents, children, siblings, or, perhaps, even ourselves. Baby Boomers, born between 1946 and 1964, represent 27% of the U.S. population and number nearly 77 million people (MetLife’s Mature Market Institute, 2005). The surge in the birth rate in the years following the end of World War II created this largest cohort in America history.

As a generation, Baby Boomers have a higher level of education and affluence than any generation before them. According to research conducted in 2005 by the MetLife’s Mature Market Institute, 88.8% of Boomers completed high school, and 28.5% have a bachelor’s degree or more. The graduation rate of Boomers exceeds the recent public high school graduation rate in the United States, which averaged 73.9% in 2003 (National Center for Educational Statistics [NCES], 2006, p. 170). Boomers also have a longer expected life span than previous generations. These numerous factors make this generation a very powerful force to contend with in American society today.

Longer life expectancy and longer life after retirement have encouraged older adults to participate in various emerging and expanding activities, especially those that involve new experiences, contributions to society, and learning (Peterson & Masunaga, 1998). In 1946, the first year of the Baby Boom generation, there was a 37% increase in people born in the United States. In 2007, this yields a 37% increase in 63-year-olds who are approaching the age of retirement (Simmons, 1999). The leading edge of this large cohort is not only nearing retirement, but also returning to higher education in record numbers. In fact, over the past three decades, the number of adult students has increased steadily (by

144%), whereas the number of students under age 25 increased by only 45% (Anderson, 2003; Creighton & Hudson, 2002).

### The Research Problem

Studies indicate that Baby Boomers are returning to college for both employment and personal reasons (Creighton & Hudson, 2002; Knable, 2000). The growing prevalence of older adult students poses several challenges within higher education. First, most institutions of higher education continue to operate according to the needs of traditional aged students (Bailey & Mingle, 2003). Both practice and research about undergraduate students have been “based largely on samples of ‘traditional,’ white undergraduate college students ages 18-22 who attended four-year institutions, full-time, who lived on campus, who didn’t work, and who had few, if any, family responsibilities” (Pascarella & Terenzini, 1998, p. 152). “Like the proverbial ‘square peg’ that meets resistance when forced to go through a round hole, adult students often struggle as they try to progress through systems of higher education that have been shaped to accommodate traditionally aged students” (Hagedorn, 2005, p. 22). This discrepancy poses a problem when trying to meet the needs of the new adult majority.

A second challenge predicated by the increased number of older adult students is the unique developmental needs that impact adult learners. As human beings, adult students have a felt need to understand and make sense of their experience—cognitively, psychosocially, and spiritually (Mezirow, 2000). For example, cognitively, it is human nature to desire a consistent maintenance of thoughts so as to minimize a sense of disequilibrium in our lives. As dynamic, living organisms, humans, however, are constantly exposed to, and sometimes seek, experiences that are new to them. They typically attempt to

make sense of these new experiences by integrating new experience into the old. Sometimes the two are discrepant and may result in a new perspective of experience. This changed frame of reference can be described as transformative learning (Cranton, 1994).

Prior studies of adult psychosocial development indicate that older adults often transition from concern about competency and personal welfare to concern about others and what is meaningful as they age (Bridges, 1980). Schlossberg's transition model identifies factors that influence a person's ability to cope with a particular transition such as going to college (Schlossberg, Waters, & Goodman, 2006). Those grappling with life transitions may also question the meaning and relevance of their remaining life's work. This form of existential engagement represents the spiritual dimension of adult development. Finding one's individual purpose and meaning-making within one's work is understood to be one's *spiritual quest* (Lindholm, Goldberg, & Calderone, 2006).

To create higher learning environments most conducive to adults' success, adult educators and program administrators need to become astute as to how the various dimensions of adult development influence student learning. Adult educators must strive to increase the capacity of students to become critically aware of their own cognitions and to assess their relevance for learning, a task which is central to adult transformative learning (Mezirow, 1997).

Another aspect of older adult learners that impacts higher education today is their close approximation toward traditional retirement age. For OBB, retirement and end-of-life issues are paramount. Many Baby Boomers will not pursue full-time retirement as generations before them did. The reality is that nearly four out of five Baby Boomers desire to continue working beyond typical retirement age due to financial and personal reasons

(Freedman, 2005b). The propensity of Baby Boomers to remain in the workforce longer is a welcome solution to employers who are facing shortages of both numbers and skill-levels of employees (Shultz, 2001; Stein, 2000).

This same propensity toward delayed retirement, however, results in a need for increased continuing professional education opportunities for older learners. This trend, in turn, has created an urgent need to know older adults' motives for seeking degrees and their future aspirations. For example, OBB who intend to continue working in at least a part-time capacity may be inclined toward work that is more personally meaningful. Half of Americans age 50 to 70 want jobs that contribute to the greater good now and in retirement (Freedman, 2005b).

Many Boomer students, then, will seek higher education opportunities to be retrained for semiretirement, social-purpose *encore careers* which afford them an opportunity to give back to society. Higher education must respond to the psychosocial, cognitive, and spiritual tendencies of people this age to become more focused on serving others. By helping older adult students become prepared for careers about people, purpose, and community, "colleges will capture a new population of students to serve, will help millions of people find greater significance and purpose in life, and will help sustain America's economy" (Zeiss, 2006, p. 40).

### Purpose of the Study

Knowing how adult learners differ from traditional aged students is critical to serving them successfully. Further studies must be conducted to more fully understand how the cognitive, psychosocial, and spiritual dimensions of adult development influence adult learning. This effort includes an examination of what is personally meaningful to members



of the Older Baby Boom generation, such as their attendance motivations, learning preferences, and future aspirations. The purpose of this phenomenological study will be to explore the experiences of degree-seeking OBB to understand the influence of adult development on both their pursuit of higher education and their vocational aspirations. Specific dimensions of adult development relevant to their transformative learning experience will be examined: (a) psychosocial development, (b) cognitive development, and (c) spiritual development.

### Research Questions

To better understand the experiences of degree-seeking Older Baby Boomers and the influence of dimensions of adult development on their aspirations for both learning and employment, the following research questions are proposed:

1. What is the experience of OBB pursuing higher education degrees? What past experiences and future aspirations bring them to higher education?
2. How do the multi-dimensions of adult development—cognitive, psychosocial, and spiritual—influence older adult students' transformative learning experiences in higher education? Conversely, how does their college experience influence their personal growth and development?
3. How do OBB view and describe the role of higher education in supporting their continued development and future vocational aspirations?

### Rationale for the Study

The study is timely due to the convergence of several trends impacting adult education today. First, the number of adults aged 50–62 (OBB) attending higher education is increasing. Second, employers in many industries are experiencing an urgent workforce

shortage in terms of both number and skill level of employees. This reality is driving people to delay full-time retirement and remain in the workforce for longer periods than was typical of past generations. Third, the elongated lifespan in the United States, age 77 today compared to age 47 in 1900 (Zeiss, 2006), provides an impetus for a new stage of adult development (second middle age), whereby those 55 to 70 years of age may “have already retired, but are still seeking purpose, and productivity” (Freedman, 2005a).

The importance of serving older adult students is evidenced in the recent announcement of The American Association of Community Colleges (AACC) of a \$3.2 million grant from The Atlantic Philanthropies to create or expand programs to serve age 50+ Americans at select community colleges around the nation (Boggs, 2007).

While a large number of “baby boomers” are close to retirement age, our country and our communities will benefit if these individuals stay engaged in the workforce and productive activities over the next two decades. . . . America needs their skills and experience, and we have a clear social imperative to keep them engaged in the professional and social structure of our communities. (Boggs, 2007, para. 4)

#### Theoretical Framework

A study that explores the intersection of older adult students’ cognitive, psychosocial, and spiritual development with adult learning theory lends itself well to qualitative research methodology. This phenomenological study will be framed within the epistemology of constructivism with an interpretive theoretical perspective. Phenomenological research, which describes the essence of a phenomenon from the perspectives of those who have experienced it, is an appropriate methodology to understand the meaning individuals give to their experience.

According to Tesch:

Phenomenological research addresses questions about common, everyday human experiences . . . experiences believed to be important sociological or psychological phenomena of our time or typical of a group of people . . . and transitions that are common or of contemporary interest. (as cited in Merriam & Associates, 2002, p. 93)

Certainly, studying the preretirement activities of the OBB, including their experience of pursuing higher education degrees, is timely and relevant. Phenomenology is an appropriate theoretical paradigm to use since the increasing number of degree-seeking Baby Boomers who are at or near retirement age is a relatively new reality that is culturally specific to a historical period in the United States (and Japan and Western Europe, for that matter).

When conducting phenomenological research, the method of collecting data is typically by description, interviews, or a combination of both. In addition to individual and group interviews, participants in this study also had an opportunity to further describe their experience in a written journal format. Affording participants the opportunity to process their thoughts through writing resulted in a more comprehensive reflection upon the influence of adult development on students' higher education experiences and plans for the future.

Research participants were selected from among those seeking a bachelor's degree in General Studies at a Midwest higher education institution. Volunteer participants were between the ages of 50 and 62 and were degree-seeking, as opposed to those engaged in life-long education for the purposes of personal enrichment or workforce development. Students must have completed at least six credit hours within their current academic program.

### Significance of the Study

“Researchers have only just begun to investigate the connections between adult learning, spirituality and transformative learning within the higher education setting” (Groen & Jacob, 2006, p. 76 ). This research contributes to the advancement of adult education knowledge and practice in a multitude of ways. First, a better understanding of the educational needs and interests of the aging Baby Boom population is acquired, which is important due to their growing demand for educational services. Second, exploring the dimensions of adult development for adult learners has important pedagogical implications for adult educators, such as employing more transformative learning and teaching strategies. Third, knowing what OBB students find meaningful can shape future adult education policy and program development. Fourth, raising awareness of the vocational perspectives of those approaching retirement may be beneficial to society, in general, and to employers, in particular, who are in need of retaining the knowledge capital so prevalent in the Baby Boom generation. Not in the least, this study will be beneficial to those OBB who are seeking avenues of both education and work to elongate meaningful purpose in their later years of life.

### Definition of Terms

*Baby Boom Generation:* Members of the population explosion that began immediately after World War II in 1946 and continued through 1964. Nearly 77 million individuals were born in the United States during that timeframe.

*Bridge Employment:* Simply put, bridge employment is work after retirement. Many individuals leave career employment before the traditional age of 65 and return to the labor market for a period of time before they fully retire. The labor economics literature refers to

this practice as bridge employment (Singh & DeNoble, 2003, p. 207). Bridge careers are flexible working arrangements such as part-time, seasonal, occasional, and project work (Stein, 2000).

*Encore Careers:* An encore career is:

a 10- or 15-year career moving from midlife priorities to greater significance, one that might not be as long as midlife work but that weighs as much. Encore careers are not bridge jobs or senior volunteering, phased retirement or any kind of retirement. They are paid positions in social change and community service that promise to make the best and highest use of people's passions, talents and experience. (Freedman, 2006, p. 44)

*Older Baby Boomers (OBB):* Defined by the author as the upper half or leading edge of the Baby Boom Generation born between 1946 and 1955. In 2007, the OBB were between the ages of 53 and 62. The age parameters of this study were adjusted to include students between the ages of 50 and 62 for three reasons. First, the upper edge of the Baby Boom population is obviously closer to retirement than the younger Baby Boomers, a consideration important to the findings of this study. Second, OBB were impacted during their developmental years by very different cultural experiences than younger Boomers, such as the Civil Rights unrest and the Vietnam War. Third, many research efforts and higher education programs are currently being directed toward adults who are age 50+ and who have entered into a relatively new concept of the “second middle age” extending from age 50–75 (Lifelong Learning for an Aging Society, 1992).

*Psychosocial Development:* The psychosocial perspective of adult development focuses on how people develop as individuals and examines primarily internal developmental processes, including how the environment may shape an internal sense of self or inner being (Merriam & Caffarella, 1999).

*Schlossberg's transition model:* A conceptualization of the transition process that was originally developed by Nancy K. Schlossberg in 1981 and revised with colleagues Waters and Goodman in 1995 and 2006. The theoretical framework categorizes the psychosocial development of adults through their life transitions in which particular events or periods of a person's life are seen as driving development such as birth, marriage, and death. The process of these life transitions fosters learning and development.

*Spiritual Development:* Spirituality concerns one's interior, subjective life and one's private, subjective human consciousness of his or her purpose and meaning in life (Astin, 2004). It is viewed as a personal transcendence over one's immediate circumstances with a sense of interconnectedness with others and a sense of purpose and meaning in one's life (Brennan, 2002; Lindholm et al., 2006). Spirituality is differentiated from religiosity. Religion is bound to code, creeds, and rituals of specific religious denominations (Tisdell, 2001, 2007).

*Spiritual Quest:* How individuals contend with important existential questions, such as how one perceives their position in the world and how one develops a sense of meaning and purpose in life, is known as their spiritual quest. Lindholm et al. (2006) defines spiritual quest as "the active disposition toward existential engagement that emphasizes individual purpose and meaning-making within the world and within one's work" (p. 512).

*Transformative learning theory (TLT):* Jack Mezirow's transformative learning theory is particularly relevant to adult learners. Learning is often understood as simply a formative process of acquiring incoming knowledge and adding it into existing perspectives of meaning. As learners develop, however, their capacity to challenge the validity of new knowledge grows, as does an ability to create new intentional experiences. This capacity to

construct new meaning from experience enables learners, particularly adults, to enter into what Mezirow (2000) defines as transformative learning. Cranton (2002) offers an alternative explanation of transformative learning theory:

Through some event, which could be as traumatic as losing a job or as ordinary as an unexpected question, an individual becomes aware of holding a limiting or distorted view. If the individual critically examines this view, opens herself to alternatives, and consequently changes the way she sees things, she has transformed some part of how she makes meaning out of the world. (p. 64)

### Summary

This phenomenological study examines the experience of degree-seeking OBB between the ages of 50 and 62. The purpose of the study is to explore how adult development—psychosocial, cognitive, and spiritual dimensions—influences students' future aspirations, both career and retirement, and their transformational learning experiences within the context of higher education. Specifically, this study explores: (a) who contemporary, degree-seeking OBB students are and how they describe their support needs as they transition back into college; (b) the learning experiences and expectations of OBB students as they move through college and how those impact their cognitive development and adult transformative learning experiences; and (c) the influence of spirituality as OBB students move out from their educational experience to vocational aspirations.

### Dissertation Organization

This dissertation uses the publication (alternate) format and includes three journal papers. Chapter 1 provides a general introduction of the research problem and includes the background, purpose, and rationale of the study. The research questions are presented along

with the theoretical framework, methodology, significance of the study, and definition of terms.

Chapter 2 provides an overview of literature relevant to adult degree-seeking students in higher education, particularly older adult learners of the Baby Boom generation. The review begins with an examination of the societal trends of the Baby Boom generation—including general characteristics and the influence of longevity, workforce changes, and retirement—on their educational aspirations. The next section of the literature review focuses on adult education in the United States and includes: (a) historical trends and philosophical roles of adult and continuing education; (b) participation patterns; (c) adult learner characteristics and goals within higher education; and (d) a view of Boomer students in higher education. A review of pertinent adult learning theories follows including Knowles' andragogy, Mezirow's transformational learning theory, and Kegan's constructive-developmental approach. The final section of the literature review serves to illuminate the adult development dimensions of older adult learners. Characteristics of adult learners and adult learning theories are examined through multiple constructs of adult development including: (a) cognitive development, (b) psychosocial growth, and (c) adult spiritual development. The specific role of spirituality in higher education is reviewed since this has become a central issue in adult education today (Astin 2004; Tisdell, 2001, 2007).

Chapter 3 provides a detailed description of the methodology and methods used in this study, including a thorough examination of phenomenology. A rationale for the qualitative approach is provided as is an explanation of the theoretical framework of constructivism. The primary methods of data collection and analysis are addressed. The



study's trustworthiness and credibility are discussed within the context of the author's assumptions and positionality. Delimitations and limitations are also reviewed.

Chapters 4 through 6 present the thematic findings of the study, embedded within the framework of the three primary research questions. Each chapter submitted for publication focuses on a different perspective of OBB students moving into, through, and out of higher education, respectively. Chapter 4 focuses on the support needs of OBB college students, and Chapter 5 examines their learning experiences. The final paper (Chapter 6) discusses OBB students' understanding of spirituality and how it influences their educational and vocational aspirations. Chapter 7 summarizes findings of the research study and suggests implications for higher education practices as well as future research recommendations.

## CHAPTER 2. REVIEW OF THE LITERATURE

This review of literature will discuss current issues and trends relevant to Older Baby Boomers (OBB), ages 50–62, who are seeking higher education degrees. Before focusing on an understanding of OBB as students, the first section of this review will examine the presence of the Baby Boom Generation in the United States, including general characteristics of OBB as compared to younger Baby Boomers. Societal trends impacting this generation will be reviewed, such as health and longevity, workforce changes, and economic patterns. Reviewing these societal trends in light of the inclinations of OBB toward retirement provides a greater understanding of their vocational aspirations beyond formal education.

To understand the phenomenon of OBB as students, an overview of the systems of Adult Education in the United States will be provided, including the specific context of adults seeking degrees within institutions of higher education. The meaning of adult education will be further nuanced by a review of the historical perspectives and goals of adult education. Since end-of-work and end-of-life issues are imminent for this generation of learners, policies and programs for older adult learners will be viewed from the guise of changing retirement practices.

Apropos to a review which informs a phenomenological study, a substantial portion of this chapter will be dedicated to examining the experience of adult students from perspectives of various adult learning theories. First, multiple characteristics of adults as learners will be considered as well as learning goals and motivation, learning preferences and styles, and adult academic performance outcomes. Next, learning theories relevant to

adults will be reviewed, in particular the transformative learning theory (Cranton, 1994; Dirkx, 1997; Mezirow, 2000).

Aside from how adults learn, other dimensions of adult development are paramount to acquiring a holistic understanding of adult students. The literature on adult development is characterized by a trend toward “integration and multiplicity of thought” (Caffarella et al., 2000, p. 2). The dimensions of adult development encompassed in this review will include cognitive/intellectual development, psychosocial development throughout the lifespan, and spiritual development.

Several adult development theories will be reviewed to explore the significance of purpose and meaning-making in one’s life for the duration of the life span: Schlossberg’s transition model (2006), Erickson’s stages of psychosocial growth (1980), and Fowler’s model of faith development (1981). These theoretical concepts, as well as more recent research on spirituality in higher education (Astin, 2004; Tisdell 2001, 2007), will provide a backdrop to understanding how the educational experiences and vocational aspirations of Older Baby Boomer students are influenced by dimensions of adult development.

#### The Baby Boom Generation

According to MetLife Mature Market Institute (2005), Baby Boomers represent 26.75% of the United States population. The top half of the Baby Boom generation, termed *Older Baby Boomers* by this author, includes 32 million adults. OBB are closely approximating the “Third Age,” that segment of the adult population age 50 to 74 (Jarvis, 2001). Looking ahead, by the year 2020 more than one-third of all Americans will be age 50 or older (Knable, 2000). By 2030, the population of those over 60 years of age in the United States is expected to grow from 45 million in 2000 to more than 91 million (University

Continuing Education Association, 2002). These numerical projections have staggering implications for all providers of adult services, including those in higher education.

### *Boomer Characteristics*

The term “Baby Boomer” was coined by Landon Jones, author of *Great Expectations*, a book which chronicles the Boomer generation. Unlike their predecessors, Boomers grew up in a time of limited adversity and abundant prosperity during the thriving, post-World War II economy. Since the amount of adversity each generation experiences in its formative years determines its general outlook on life, Boomers are optimistic and more outwardly focused in their efforts toward others. As a result, Boomers value personal fulfillment and have resisted authority, fought for civil rights, rallied for peace, and embraced the controversial rock and roll music (Wendover, 2004).

### *Boomer Values*

Because of its size, this generation wields extensive marketing attention and influence on governmental policy and consumer products. Boomers are willing to risk debt accrual for future opportunities. They have not only driven the economy but have agitated for a more inclusive, efficient, and service-oriented workplace. They live to work. Many Boomers took advantage of college access opportunities, and, as the best educated generation in American history, they raised the bar on employment positions (Center for Generational Studies, 2004).

The Baby Boom generation has a felt need to play a fulfilling role in the world (Dempsey, 2007; Freedman, 2006). Their idealist desire to give back and share their knowledge and skills influences how Boomers approach volunteer opportunities, part-time

bridge employment, and encore careers. For example, according to the 2006 Merrill Lynch *New Retirement Study*, Boomers' top picks for next careers were consultant and teacher.

#### *Younger Boomers vs. Older Boomers*

Those in the upper half have had very different cultural experiences than those in the younger half. Older Boomers were born between the end of World War II and the Korean War. They come of age during the turbulence of civil rights and the Vietnam War. Older Boomers are more likely to vote than Younger Boomers, 69% to 56% (MetLife, 2005).

Regarding finances, OBB are slightly better off financially than Younger Boomers, with an average household income of \$58,889 compared to \$56,500, and fewer OBB are living at poverty level (6.4%) than Younger Boomers (8.2%) (MetLife, 2005). They spend much more on adult apparel, home improvements, and hotels/vacation homes than Younger Boomers, who spend more on children's items. Not surprisingly, since they are older, OBB spend 20% more than average on life insurance and other personal insurances.

#### *Societal Trends Impacting the Boomers*

Spanning 18 years of the population, the Baby Boom generation is a powerful force to contend with in American society today. The disproportionate size of the Boomer generation certainly has profound effects on modern society as they move through the lifespan. Many societal trends have, in turn, impacted this generation as a whole.

#### *Seminal Events*

Seminal events influencing the Baby Boom generation centered on political advancement and social activism. The introduction of birth control pills in 1960 was a precursor to the feminist movement of the 1970s. Humanitarian efforts were augmented by the establishment of the Peace Corps in 1961, the leadership of John and Robert Kennedy,

the inspiration of Martin Luther King, and the passing of the 1964 Civil Rights Act/Title VII. The highs of space exploration and Woodstock were offset by the lows of the Vietnam War and the Kent State University shootings (Center for Generational Studies, 2004).

### *Health and Longevity*

The aging of our population is likely to produce a variety of changes in society at large and in higher education as well. The older adult population—the Third Age—has become more and more visible, mainly because of its increasing size and proportion of the population. Longer life expectancy and longer life after retirement result in older adults participating in various emerging and expanding activities, especially those that involve new experiences, contributions to society, and learning (Jarvis, 2001; Peterson & Masunaga, 1998).

### *Workforce Changes*

Increasing global economic competition and rapid technological advances are changing the skills and educational qualifications necessary for individual job success and national economic health. Since postsecondary education has long driven individual social mobility, many adult learners are motivated to earn a college degree or certificate to attain the knowledge and skills necessary to succeed in the workforce. Regarding economic and workforce development, one must ask, “What is driving this propensity toward more education, even on the part of many who already have advanced degrees?” With impending labor shortages and a highly competitive global economy, adults recognize that the knowledge and skills they learned in college, if they had that opportunity, are becoming obsolete (T. Carnevale, 2005).

The need for adult education opportunities is urgent. The nation's labor force includes 54 million adults who lack a college degree; of those, nearly 34 million have no college experience at all (Pusser, Breneman, Gansneder, Kohl, Levin, Miliam, et al., 2007). Between 1980 and 1997, 34 million new jobs were created that required some form of postsecondary education, while about 7 million jobs were eliminated that required only a high school diploma (Bailey & Mingle, 2003). In the United States alone, it is estimated that some 60 million workers need continuous training to keep up with new technologies to help their companies compete. "Increasingly, these workers are seeking training on their own because there isn't enough time or money for their companies to shuffle them in and out of a training classroom" (Caudron, 1999, p. 29). Consequently, millions of adults have become "free agent learners" and are using all sorts of means to acquire new skills and knowledge. Thus, the phenomenon of increasing numbers of adult students is not simply a result of demographics, but also a ramification of economic and workforce development trends.

#### *Economics and Retirement Patterns*

Increasing demands for workforce productivity and the projected shortage of skilled and experienced workers will require more accessible adult education opportunities. Simultaneously, older adults' increased health and longevity and their desire to stay engaged in the socially meaningful activity of work will keep older adults in the workforce longer. In addition, Boomers' need for financial security will force many to work well beyond the age that their parents worked (Munnell, Sass, & Soto, 2006; Wendover, 2004).

Several demographic trends unique to the Boomer population could actually result in the need for more retirement wealth to provide the same standard of living over a longer period of time. First, the retirement system has changed for Boomers, offering less

defined-benefit pension income than the previous generation and an increased reliance on 401(k) savings which are subject to the volatile stock market. In addition, real long-term interest rates have declined in the past few years. One employer survey indicates that a quarter of all Boomers currently in their 50s will lack the resources needed to retire at the age similar workers have in the past. In response, many will want to stay on the job at least two years longer (Dempsey, 2007; Munnell et al., 2006). Indeed, in the current global economy, it may behoove both employees and employers for individuals to remain working for a greater number of years.

Another factor impacting the economic well being of Boomers is the fact that their divorce rate is dramatically higher than that of their predecessors. The financial impact of divorce primarily affects women. Those who have the greatest risk for poverty in their senior years are women of color. For example, the Center on Budget and Policy Priorities reports that the proportion of African American women who will be single when they reach age 62 will increase from about 5% of Depression-era women to about 18% for Boomers (as cited in Dempsey, 2007, p. 38).

### *The Third Age—Older Boomers and Retirement*

#### *Redefining Retirement*

Most Boomers do not perceive themselves as old and, consequently, are redefining the aging process. They envision a new way of working and are recharting the concept of retirement. The Merrill Lynch report, conducted in 2006, identifies the new retirement as “cyclical”—a blend of work that can take Boomers in and out of new careers balanced with free time, continued learning, volunteerism, and travel.



Never before have so many adults been this well-educated on average and desired to stay in the workforce beyond typical retirement years. Trends of working after retirement may seem oxymoronic, but for most people it makes good personal, financial, and societal sense. Many Boomers will need to work for the money, the health insurance, or greater economic security. Others may not have a financial need to remain in the workforce but want the structure in their lives, the social connections, and a sense of identity and purpose (Freedman & Moen, 2005).

#### *Bridge Employment and Encore Careers*

Recent surveys by the American Association of Retired Persons (as cited in Knable, 2000) and *Parade Magazine* (as cited in Pusser et al., 2007) indicate that 70–80% of Baby Boomers say they plan to work at least part-time after the typical retirement age of 65. Only 16% said they would not work at all. Thirty-five percent said that they will be working for the sake of interest and enjoyment, while 23% said they would work for the income it provides. Seventeen percent stated they would be starting their own businesses.

Full-time retirement is outdated. Rather, full-time work may be interspersed with periods of “bridge employment,” flexible working arrangements such as part-time, seasonal, occasional, and project work (Stein, 2000). Furthermore, two-thirds of Boomers who expect to work in some capacity in retirement would prefer to change their line of work (Merrill Lynch, Pierce, Fenner, & Smith Incorporated, 2006)! Hence, Boomers needing updated job skills or retraining for “semi-retirement” bridge employment and encore careers will seek adult education opportunities.

Adult Education in the United States

A new generation of retirees who are more affluent, better educated, and healthier than any previous generation in American history are seeking expanded adult education opportunities. To meet this demand, programs in community-based, nonprofit, and for-profit organizations will supplement traditional providers of adult education (colleges and universities). A strong desire of older adults to delay retirement or to return to the workforce after formal retirement, in both full- and part-time second careers, is resulting in an increased demand for Continuing Professional Education. Institutions of higher education will thus need to expand their formal degree and certificate programs.

#### *The Meaning and Definition of Adult Education*

Adult education is a diverse arena defined in a variety of ways (Cohen & Brawer, 2003; Knowles, 1980; Manheimer, 2002; Merriam & Caffarella, 1999). Some regard adult education as noncompulsory or voluntary learning activities that constitute a continuous learning process throughout life. Others include required activities in their definitions because a large proportion of adults are required to participate in work-related Continuing Professional Education (Cervero, 1989). Yet another way of defining adult education includes not only formal coursework or training, but also informal educational activities (that is, those that do not involve an instructor and are self-directed) and nonformal educational activities occurring in community centers, public libraries, private organizations, and religious organizations (Merriam & Caffarella, 1999).

#### *Roles of Adult Education*

Adult education serves several purposes: (a) to facilitate change in a dynamic society, (b) to support and maintain a good social order, (c) to promote productivity, and (d) to enhance personal growth. Some narrowly construe the primary purpose of adult education

as furthering the bottom line and advancing training (as opposed to education). Historically, however, the roots of adult education were based in humanism—in community action, social development, and the social gospel. “There is evidence today that both the spiritual and social change purposes of adult education are being given closer scrutiny in all aspects and contexts of adult education” (English, 2005, p. 1170). These historical nuances of adult education are addressed in the next section.

### *Historical Perspectives of Adult Education*

The field of Adult Education has a complex history based on guiding assumptions put forth in Lindeman’s hallmark work, *The Meaning of Adult Education*, in 1926.

According to Lindeman, (as cited in Glowack-Dudka & Helvie-Mason, 2004), “Adult education will be via the route of situations, not subjects . . . [that the] resource of highest value in adult education is the learner’s experience . . . [and that] authoritative teaching, examinations which preclude original thinking, rigid pedagogical formulae—all have no place in adult education” (p. 7).

*Beginnings of adult education.* Formal courses in adult education methodologies were taught at Columbia University beginning in 1918. These courses arose from a pressure on teachers to support vocational education and to carry the work of the university into the industrialized workplace. Consequently, in 1930, Columbia began the first Department of Adult Education (Glowack-Dudka & Helvie-Mason, 2004).

*World War II.* Prior to World War II, earning a college degree was limited to an elite, privileged 5% of the population. After World War II, attitudes toward adult learners began to change. The Serviceman’s Readjustment Act of 1944—the GI Bill—flooded colleges and universities with veterans who had demonstrated a great capacity to learn at

advanced levels during wartime duty. These “new adult students” were mature, goal directed and academically able. Those who lacked high school diplomas first took advantage of the General Education Development (GED) examination. For the first time in history, access for adults to higher education became easier, especially through the growth of the community college system (Maehl, 2004).

*1960s—Lifelong learning.* Older Baby Boomers came of age during this decade. By 1960, the term “lifelong learning” emerged and came to signify constant retraining for vocational changes, rather than simply voluntary learning across the lifespan. The Adult Education and Literacy System of the U.S. was formed when President Lyndon Baines Johnson signed the Adult Education Act into law in 1966. Adult education in American Higher Education, however, was subject to social and political unrest. Students demanded more relevant curricula and flexibility in their learning. Adult services were no exception, and innovators looked for creative ways to meet specific adult learning needs. A new Commission on Non-Traditional Study emphasized the ideas surrounding the adult degree movement—“antielitist education focused on egalitarian, humanistic and moral bases and aimed at person-centered learning” (Maehl, 2004, p. 7).

*1970s—Continuing professional education.* According to an American survey in 1972, between one-quarter and one-third of colleges offered nontraditional degree programs (Maehl, 2004). Three types of degrees were available to adults: extension degrees (traditional degree patterns with adapted scheduling convenient to adults), adult degrees (degrees individually designed to service adult clientele needs), and assessment degrees (focused on student’s learning and demonstration of competence rather than fulfillment of formal requirements). Furthermore, in the 1970s continuing education, which focused on

individualized study approaches, became the basis for relicensure and recertification in many professions, a model still in place today.

*1980s—Rise of adult degree programs.* Despite the declining numbers of traditional aged students in the 1980s (as the Younger Baby Boomers entered adulthood), higher education enrollment grew by 10% (Maehl 2004). This growth came from adults who continued to replace the declining traditional aged college population of the postwar Baby Boomers and entered into organized and comprehensive programs in professions. Institutions that expanded had successfully embraced Bowen’s argument that “the unused capacity arising from youth enrollment decline should be redirected to hasten the goal of a nation of educated people” (as cited in Maehl, 2004, p. 10).

As more adults came to higher education in the 1980s, many brought considerable amounts of previously earned academic credits. This led to adult degree completion programs in which cohorts of students completed prescribed coursework together with a momentum that sustained motivation and retention. Most notably, this trend surfaced in the external doctoral degree programs, a model that matured in the 1980s.

*1990s—Arrival of distance learning.* Hallmarks of higher education in the 1990s reflected what was occurring in the workforce—economic globalization and advanced technology.

Three trends in the 1990s increased adult participation in degree study and affected its delivery. First was an emphasis on occupational preparation or human capital development. Second was the growth of for-profit providers with an acute sense of emerging market potential and the need to maintain high standards of service. Last was the use of advanced technology in distance learning to an extent that outstripped earlier technology-based programs. (Maehl, 2004, p. 12)

The U.S. market for web-based training generated millions in revenue in the 1990s (Caudron, 1999), and student enrollment in distance education skyrocketed (D. Carnevale, 2005; Ebersole, 2003). These trends seemed to lend credence to the perception that the United States is well on its way to becoming a learning society.

#### *Participation Trends in Adult Education*

Data from the NCES Adult Education Surveys of the National Household Education Surveys Program indicate participation rates in adult education over time. Between 1995 and 1999, rates of participation in formal adult education increased from 40 to 45% (Creighton & Hudson, 2002). According to the NCES report, *Participation in Adult Education and Lifelong Learning: 2000-2001*, nearly 92 million adults (46%) participated in one or more types of formal educational activities (Kim, Collins-Hagedorn, Williamson, & Chapman, 2004).

Several adult education trends are worth noting. Adult participation rates were higher for those age 50 or younger than for older adults. Women participated at a higher rate than men. Prior educational attainment of adults was positively associated with participation in educational activities (22% for those who had not completed high school vs. 66% for those with a bachelor's degree or more). Household income was positively related to the participation of adults in educational activities. Adults who had never married participated at higher rates (52%) than did all others. It is interesting to note that the percentage of Baby Boomers who never married (12.6%) is significantly higher than prior generations (MetLife, 2005).

Other indications in the NCES report included the fact that employed adults participated at higher rates (54%) than those who had not worked (25%). In 2001, adults in

higher status occupations participated at higher rates than those in lower status occupations. Recent reports indicate that the overall participation rate in adult education is higher for those in a professional or managerial occupation than for those employed in service, sales, or support jobs or those in trade occupations (NCES, Condition of Education, 2006). This trend may be indicative of professionals returning to school to stay current in their credentials and certifications. Baby Boomers have a higher level of education than any generation before them. With 88.8% of Boomers having high school degrees and 28.5% having a bachelor's degree (compared to the national average of 24%), it makes sense that they will likely pursue continued higher education (MetLife, 2005).

#### *Future Directions of Adult Education*

*Lifelong learning as career-span learning.* Lifelong learning is central to the maintenance and improvement of professional practice. Effective continuing professional education programs will: (a) be responsive to diverse learning characteristics, including current knowledge, skills, and attitude; (b) agree on important learning objectives; (c) use active engagement in learning activities to achieve mastery; (d) evaluate feedback to guide the process; and (e) support participant's commitment to learn and apply what is learned (Knox, 2003). Knox indicates that the learning abilities and capacities of most professionals are sufficient for them to continue to enhance their proficiencies throughout their careers. Thus, Knox, along with Pickney and Flabello (1995), proposes that effective continuing professional education should address career-span learning and performance with a focus on abilities, not just disabilities.

*Programs for older learners.* The breadth of adult educational opportunities is evidenced in the vitality of more than 40 national adult education organizations such as

Elderhostel, Institutes for Learning in Retirement, OASIS Institutes at shopping centers, SeniorNet, and Community College Continuing Education Departments (Eisen, 1998). The interest in adult education abounds and, since Boomers have a combined spending power of \$2.1 trillion (MetLife, 2005), the increasing presence of older adult students may represent a windfall for colleges and universities that are alert to the possibilities. For example, since campuses are already accustomed to meeting the housing, dining, medical, recreational, and security needs of large numbers of people, serving an older population could present abundant opportunities for growth (Trachtenberg, 1997).

*Adult degree programs.* Of the many adults receiving work-related instruction, 21% do so at postsecondary institutions (Paulson & Boeke, 2006). To sustain viable adult degree programs, institutions must be strategic in recognizing that adult degree programs require the same rigorous quality as traditional academic programs. According to Pappas and Jerman (2004), adult degree programs must be adult oriented with real services and relevant content. To compete with the for-profit providers, higher education institutions that offer adult degree programs must use effective marketing techniques to inform adults about their programs. Since future adult degree programs will likely continue to accommodate large numbers of at-a-distance international students, technology-based pedagogy will be the dominant delivery force.

Adult education programs in American colleges and universities will need four critical variables for successful program development and stability: (a) prominent organizational placement of the formal program, (b) financial resources, (c) academic authority of the program, and (d) innovative professional leadership of the program. These variables alone, however, will not guarantee successful older adult education programs. A



national, cohesive policy for older adult education is almost nonexistent, a deficiency noted by adult education researchers (Knox, 2002; Peterson & Masunaga, 1998).

*Need for adult-friendly policy changes.* Knox (2003) writes of the need for policy changes that will result from adult educators developing a shared, field-wide vision. Postsecondary policymakers, institutional leaders, and other stakeholders need to make policy changes which will provide convenient and affordable access, create flexible subsidies, and develop innovative planning tools to increase student success. Several avenues for change within adult education have been identified in the 2007 Lumina report about adults returning to college (Pusser et al., 2007). First, degree completion programs are paramount for the millions of working adults who have not completed a four year degree. Second, institutions and organizations providing adult education must recognize adult learners as a diverse and complex set of individuals with widely divergent aspirations, levels of preparation, and degrees of risk. Third, adult students demand increased entrepreneurial postsecondary institutions and programs, including continuing education, contract education, satellite and online programs, and for-profit institutions. Fourth, credit for course completion remains a key component of baccalaureate attainment, and prebaccalaureate programs should increasingly be linked to credit attainment, as should the “hidden college” of noncredit, revenue-generating courses. Finally, states’ attention and resources devoted exclusively to P–16 educational reform programs must be expanded to more adequately serve adult learners (Pusser et al., 2007, p. 2). In short, policymakers must recognize adult students’ diverse goals and differing educational pathways.

#### Adult Learners

Higher education in the United States is more diverse today because of dramatic shifts in the general population and increased attendance among adults. In 1970, about 2.4 million of America's 8.5 million undergraduate students were 25 years old and older. Over the past three decades, the number of older students has increased steadily (by 144%), whereas the number of students under age 25 increased by only 45% (Anderson, 2003; Creighton & Hudson, 2002). The significance and scope of these adult learners lie, in part, in their sheer numbers. Their increased demand for adult education has resulted in nothing short of an adult degree revolution (Maehl, 2004).

#### *The New Adult Majority*

The stereotyped image of the college student as one who is 18–24 years old in residential, full-time study is being challenged by a new reality of working adults who are creating a new undergraduate majority at college campuses across the country (Council for Adult and Experiential Learning [CAEL], 2005; Hagedorn, 2005; Pascarella & Terenzini, 1998; Pusser et al., 2007;). Adult students are typically defined as those age 25 and older and are identified within a larger group characterized as “nontraditional” students.

According to Creighton and Hudson (2002), the following seven characteristics typically define nontraditional students: (a) have delayed enrollment into postsecondary education; (b) attend part-time; (c) are financially independent of parents; (d) work full-time while enrolled; (e) have dependents other than a spouse; (f) are single parents; and/or (g) lack a standard high school diploma.

#### *Not Traditional Students*

Adult college students do indeed have many characteristics different from their traditional counterparts. Adults demand creative ways to complete their education where

they spend little or no time on campus, such as taking courses through the Internet and other distance technologies. Many adult students who also have the responsibility of children and a full-time job are members of the “sandwich generation,” adding the role of parental caretaker to their other roles. The majority of adult students attends part-time, is female, has children in the household, is married, and is employed (Kim et al., 2004). According to Cohen and Brawer (2003):

The rise in the number of part-time students can be attributed to many factors: a decline in the absolute number of eighteen year olds from 1979-1992, an increase in the number of students combining work and study, and an increase in the number of women attending college, to name but a few. (p. 42)

#### *Characteristics of Adult Learners*

Hansen (2003, p. 26) suggests that the field of adult education holds core concepts about adult learners to which most adult educators subscribe. People are more willing to invest the time and energy to learn something when they understand how it will be useful to them. Adults bring a lifetime of experience to every learning situation, and a good teacher will create opportunities for people to reflect and build upon their experience. A good presenter will use a process of mutual inquiry rather than simply transmitting information and expecting pupils to accept and conform to it. People learn in different ways. Some people prefer the concrete; others prefer the abstract. Some prefer to learn by watching; others learn by doing. A good teacher will try to incorporate as many different learning preferences into his or her instruction as possible. Many adults prefer to participate in the planning and implementation of a learning activity.

*Self-regulation and goal setting.* Ideally adult students engage in self-regulation which occurs when the learner regularly makes decisions regarding how to organize

incoming information. For example, setting goals as standards enables the learner to then determine whether he has successfully met the learning goal. Critical reflection, in this case metacognition, enables the learner to make adaptations and guide their own learning more effectively. “Metacognition—the self-awareness of cognitive processing strategies and the ability to control them—plays a significant role in most theories of learning” (Silverman & Casazza, 2000, p. 49). This capacity to become critically aware of one’s own cognitions and to assess their relevance for learning is important to adult transformative learning.

*Self-directed learning.* Those who learn to self-regulate can self-direct their learning. Self-directed learning occurs as adults free themselves from externally imposed direction in their learning and become proactive in initiating their own experience (Brookfield, 1986; Cranton, 1994; Mezirow, 2000). Self-directed learners have the ability to determine their own purposes, values, and meanings rather than simply to act on those of external authorities. In this manner, increased self-directedness is a product of transformative learning and requires a shift of authority from the educator to the learner. This is not an easy, automatic process that simply comes with age.

Educators seeking self-direction from their adult students are not merely asking them to take on new skills, modify their learning style, or increase their self-confidence. They are asking many of them to change the whole way they understand themselves, their worlds and the relationship between the two. (Kegan, 2000, p. 67)

Silverman and Casazza (2000) identify several principles relevant to the facilitation of self-directed learning. Self-directed learning enables learners to actively control their learning through the establishment of learning goals that enhance motivation. As the process of self-direction continues, learners increase their sense of self-efficacy. To engage in self-regulation of learning, learners must make direct connections between their use of

strategies and outcomes. A minimal level of prior knowledge in the learning domain is helpful, as is an internal commitment to the process.

*Autonomy.* Related to self-directed learning, becoming autonomous is a transformative process wherein learners become free of distorted meaning perspectives. Brookfield (1986, p. 58) defines autonomy as “the possession of an understanding and an awareness of a range of alternative possibilities.” To be autonomous requires that one be aware of his or her separateness and power to learn. The more autonomous one becomes, the more likely he or she will engage in transformative learning. For example, if a student perceives himself as a poor reader because he reads slowly, yet comes to the realization that his reading comprehension is very high, he may come to be freed from the distorted perspective of himself as a poor reader.

*Critical thinking.* Critical thinking is central to adult learning. Often a life crisis will precipitate critical thinking about one’s long held views, values, and priorities. If the consequence of such critical reflection is a changed perspective, one has experienced emancipatory learning. Furthermore, if one is able to act upon new assumptions in a freer, more holistic manner, s/he has experienced transformative learning.

Brookfield (1986) identifies the following phases of becoming a critical thinker. First, a trigger event prompts inner discomfort and perplexity which, in turn, cause one to appraise oneself. Trigger events can be positive occurrences such as a promotion at work or negative events such as the death of a loved one. Learners then either explore ways to explain the painful discrepancies or live with them. This scrutiny leads to the development of alternative perspectives or new ways of thinking and acting which then become integrated into one’s life.

### *Adult Learner Aspirations in Higher Education*

The diversity of adult learners makes them very difficult to study. Meeting their varying aspirations is even more challenging, as Ebersole (2003) eloquently acknowledges:

Driven by an understanding of the tightening connection between educational attainment and earnings, Americans have come to expect universal access to the academy, and to the skills and knowledge necessary to succeed. . . . With this has come the expectation that U.S. colleges and universities will be more responsive to a student body that is no longer traditional in its composition. This group now includes working students, older students, part-time students, students for whom English is a second language, and professionals seeking to update their knowledge and who may not see themselves as students at all.  
(p. 10)

*Reasons for attendance.* Adult learners participate in educational activities for a variety of personal and professional reasons: (a) to acquire the knowledge and skills necessary to succeed in the workforce; (b) to earn a college or advanced degree or certificate; (c) to learn basic and language skills; or (d) to enrich their personal lives (Creighton & Hudson, 2002; Eduventures, 2006; Knable, 2000). Knowing the background characteristics and the unique reasons adults have for attending college is critical to understanding what goals and values most motivate adult students.

Many adult students are seeking higher education due to a changing job market which necessitates a return to school to upgrade skills in math, language, and critical reasoning. Professionals not seeking new career paths are returning to school to stay current in their credentials and certifications. Others return to college to satisfy their personal goals such as degree attainment, supplemental income to support a change in marital status, and pursuit of training for a new hobby. Seventy-three percent of Baby Boomers polled by AARP said that they would expect to have a hobby or special interest to take up in their retirement (Koppen & Anderson, 2007).

Adult learners (age 45–54), who participated in college or university degree or certificate programs (part-time) in 2002-2003, gave the following reasons for attendance, in this order: (a) to maintain or improve skills or knowledge, (b) to learn completely new skills or knowledge, (c) to help change job or career field, (d) to get or keep a certificate or license to receive a promotion, and (e) because their employer recommended it (Paulson & Boeke, 2006).

*Compared to traditional students.* Compared to traditional students, adults often have different reasons for attending college, such as death of a spouse, divorce, unemployment, an empty nest, industry-wide downsizing, technological change, and outdated skill sets. Hagedorn (2005) found several differing reasons for attendance in which adult students ranked items as more important than did traditionally aged students: (a) could not find a job, (b) employer encouraged attendance, and (c) degree/certificate was needed for work. Attendance posed greater barriers for adult students than traditional students regarding: (a) finding time for college, (b) family responsibilities, (c) job responsibilities, and (d) degree/certificate needed for work. Paying for college, however, was found to be less of a barrier on average for adult students than for traditional students.

*Adult learner values.* Because of their differing values, adult students may be more other and outward focused than younger students who may be more inwardly focused on personal gain or powerful influence over others. Adults may be seeking different levels of outcomes related to their college experiences and learning. For example, some research suggests that adults differentiate between learning that: (a) is required to pass an academic test; (b) actually increases their knowledge and understanding of the world; (c) can be

applied directly at work, in their families, or in other life situations; or (d) can be used to help the larger community or for the benefit of society (Donaldson, 1999).

Another study suggests that adult students are more focused on learning goals (the desire to increase competence and continually improve oneself) than on performance goals (the focus on task completion (Morris, Brooks, & May, 2003). Bridges also contends that: “a growing concern for meaning and a loss of interest in simple performance is evident in many people after mid-life” (1980, p. 46). Perhaps adult students, with more expansive life experiences than traditional students, are therefore more intent on pursuing learning experiences that will yield personal meaning rather than simply personal performance.

*Motivation of adult learners.* Adult learners are not simply influenced by their sense of self and cultural identity or by their past learning experiences. Motivation is another critical factor to consider in successful adult learning. How students perceive success and failure and whether they attribute those outcomes to external forces or internal forces (locus of control) influence their motivation to succeed. Furthermore, their self-efficacy—the belief that they are capable of success—and their self-esteem—the belief that they are worthy of success—reflect their sense of self. Unsuccessful learners may begin to integrate their belief of being incompetent with their self concept.

#### *Adult Learner Needs and Preferences*

*Learning styles and preferences.* Silverman and Casazza (2000) identify a framework consisting of four components relevant to differing learning styles and preferences: (a) cultural factors, (b) physiological factors, (c) personality-based styles, and (d) instructional preference. Each component greatly impacts the learning experience and



expectations of learners. For example, in the United States' egalitarian culture, students are expected to actively engage in class discussions, freely expressing their opinions and values.

Silverman and Casazza (2000) suggest several principles about learning styles and preferences to consider when educating adults:

1. Cultural transitions are created by providing students the opportunity to link their personal experiences to the learning environment. Learning will be most successful when multiple cultural styles of communication are recognized and respected.
2. Not only must one be aware of cultural differences, but one must not assume that all learners from particular cultures share similar patterns of expectations or behavior.
3. Different learning styles and preferences do not imply different abilities to learn.
4. A range of instructional styles is necessary to accommodate the wide range of learning styles and can increase learners' own repertoires of learning approaches.

(p. 204)

*Psychological type.* Cranton (1994, 2000) agrees that it is important to know how individual learners differ in their understanding of learning. "People with different learning styles, cognitive styles, and personality traits both assimilate and reconstruct frames of reference in distinct ways" (1994, p. 181). In particular, one's unique psychological type separates the individual from the collective of humanity through individuation. This process of individuation can be transformative and result in the reconstruction of a frame of reference related to the self. Students come to see their past experiences in a new light which leads to a different, unique sense of self. Thus, fostering an understanding of one's

psychological type helps learners to better know their concept of self, and, consequently, influences their learning experiences.

### *Adult Learner Success*

*Adult learner persistence.* McGivney (2004) identified additional factors that contribute to adult learner persistence. First, adult learners are often more motivated than traditional aged learners due to their focused goals and, perhaps, the sacrifices they have made to return to school. A supportive family or partner significantly assists adult persistence. Financial support, particularly tuition remission from an employer, is helpful to adult learners. Receiving good pre-entry information and advice increases the likelihood that adults will complete degrees. A high quality academic experience with good course content and presentations, effective tutors, and a supportive learner group can make a positive impact on adult student persistence.

*Academic performance outcomes.* In 2002–2003, those adult learners (age 45–54) who participated in a college or university degree or certificate program (part-time) for work-related reasons, indicated the following outcomes from participation: (a) improved skills and knowledge, (b) increased employability in the labor market, (c) improved ability to advance in career, (d) learned entirely new skills, (e) made more money, and (f) acquired a new job or position (Paulson & Boeke, 2006).

Adult students over the age of 25 earn higher grades in both developmental and college level courses because grade performance improves with age. Adult students also have higher rates of retention than traditional aged students (Hagedorn, 2005). Despite the fact that adult students typically do not have the time to get involved in on- and off-campus activities to the same extent that traditional aged full-time students do, their growth in

intellectual and academic development is equal to or greater than that of younger students (Graham & Donaldson, 1999). Adults may compensate for their lack of time by having clearer purposes in mind about their participation in college. Adults may use more sophisticated procedural and metacognitive knowledge and skills that they have developed in their out-of-school experiences that they then bring to bear in managing their own approaches to learning.

### *Teaching Adult Students*

Due to adult expectations of learning and the key learner differences between youths and adults, adults require different instructional strategies than the typical teacher-centered and subject-centered pedagogy. Mezirow (1997) contends that:

Transformative learning requires a form of education very different from that commonly associated with children. New information is only a resource in the adult learning process. To become meaningful, learning requires that new information be incorporated by the learner into an already well-developed symbolic frame of reference. (p. 10)

In addition to being cognizant of the characteristics of adult learners, the learning process, the learning context, and their own philosophical assumptions, educators of adults must strive to create an environment conducive to lifelong learning.

*Effective environment for lifelong learning.* The response of adult learners to the environment can also have a powerful effect on learning. Mezirow noted that a key component to the successful motivation of adult learners is to:

create an environment by which adult learners can examine new information, beliefs, and values against their old ones. This process of perspective transformation often involves a thoughtful analysis of an existing perception of one's experience, and the construction of a new, more inclusive explanation of that perception. (as cited in King & Lawler, 1998, p. 4)

Many factors can contribute to attaining this transformative experience, and support has been identified as one of these (CAEL, 2005; McGivney, 2004). Both learner empowerment and the support of learners are critical to the fruition of the transformative learning process.

*Teaching strategies.* Several adult teaching strategies have been identified which make good learning theory come alive for adult students: (a) create a climate of respect for diverse populations; (b) encourage active participation by modeling the very skills you want students to learn; (c) enable students to become independent learners by helping them build on their experience; (d) employ collaborative inquiry through active dialogues and problem solving; (e) learn for action and immediate application; (f) empower the participants to assess their own skills and make change; (g) teach basic skills early and maintain high but realistic expectations; and (h) emphasize group work (Bigrigg, 1998; Brookfield, 1986; Johnson, 2005; Lawler, 2003).

#### *Older Adult Learners—Boomers in Higher Education*

The strong desire of older adults to return to the workforce after formal retirement (in both full- and part-time second careers) results in an increased demand for adult continuing education (Manheimer, 2002). The 2006 Merrill Lynch Retirement Survey indicated that 25% of OBB who attended classes or training did so to prepare for a new career in retirement. Also, 13% of the survey sample obtained a degree or certificate for the same reason (p. 8).

Having already broken many precedents in their march through the life cycle, the Baby Boomers—as senior citizens and returning students—will confront their instructors a new kind of adult student. Many Baby Boomers are likely to be college graduates, and for them, intellectual curiosity is likely to be an underlying motive for a return to the classroom.

In a classroom of that kind, discussion is likely to move beyond the introductory level and focus on whole lifetimes of experience. Because Baby Boomers are interested in looking back and assessing their lives, “A passion for humanism, often thought to be a casualty of our utilitarian and career-centered age, may well experience a rebirth in some classrooms” (Trachtenberg, 1997, p. B1).

At a time when the relationship between America and its colleges and universities seems troubled and uncertain, the potential arrival of the Baby Boomers at the gates of higher education raises remarkable possibilities. Trachtenberg suggests that:

Institutions may once again find themselves at the very core of American culture and of what will be seen, in retrospect, as the new American life style—one in which those rich in years keep themselves in optimum shape through a combination of physical and intellectual activity, in a setting uniquely suited to their maturity. (1997, p. B5)

#### Adult Learning Theories

Since “the whole point of theory—any theory—is to help us understand something better” (Caffarella et al., 2000, p. 1), many adult learning theories have been developed in an attempt to better understand adult learning. Adult learners are first and foremost human beings. As human beings, they have a felt need to understand and make sense of their experience. It is human nature to desire a consistent maintenance of thoughts so as to minimize a sense of disequilibrium in our lives. As dynamic, living organisms, humans, however, are constantly exposed to, and sometimes seek, experiences that are new to them. They typically attempt to make sense of these new experiences by integrating new experience into the old. Sometimes the two are discrepant and may result in a new perspective of experience. This changed frame of reference can be described in many different ways as learning (Cranton, 1994; Mezirow, 2000).

### *Merriam and Caffarella's Multi-lens Model*

Despite general agreement of these characteristics of adult learners, the territory of adult learning theory is extremely diverse and complex. Merriam and Caffarella (1999) have developed perhaps the most comprehensive guide to adult learning theory to date. Their concept of the adult learning process centers around three areas: the nature of the adult learner, the learning processes they engage in to learn, and the context within which adults learn.

#### *The Learner Lens—Knowles' Andragogy*

The learner lens focuses on nature and characteristics of the individual adult learner. Knowles (1980) is the most prominent theorist in this regard; he proposed andragogy, “the art and science of helping adults learn” (p.43). Knowles differentiates adult learners from children in that they tend to see themselves as more responsible, self-directed, and independent, and have a larger, more diverse stock of knowledge and real-life experience from which to draw. Adults have a problem-centered orientation to learning and have a stronger need to know the reasons for learning something. In general, they tend to be more internally motivated. Due to these characteristics, adults require different instructional strategies than the typical teacher-centered and subject-centered pedagogy typically found in K–12 education. Indeed, according to Kiely, Sandmann, and Truluck (2004), adults should participate as much as possible in the content, delivery, and evaluation of curricula within a climate of mutual respect.

#### *The Process Lens—Mezirow's Transformational Learning Theory*

The process lens focuses on how adults learn; the most prominent model addressing this issue is Mezirow's transformational learning theory. Adult learners come to the

classroom laden with life experience. When adult learners reflect on their biases and assumptions, they are often able to recognize and overcome their distorted misconceptions and therefore realize their potential for becoming more liberated, socially responsible, and autonomous learners. According to Mezirow:

A defining condition of being human is that we have to understand the meaning of our experience. For some, any uncritically assimilated explanation by an authority figure will suffice. But in contemporary societies we must learn to make our own interpretations rather than act on the purposes, beliefs, judgments, and feelings of others. (1997, p. 5)

Mezirow, often regarded as the originator of transformative learning theory, believed that such understandings are the cardinal goal of adult education. Successfully educating adult learners requires an understanding of adult development and learning theories, as well as characteristics of adult learners. In particular, the task of assisting adults in reinterpreting the meaning of their life experience requires educators to facilitate transformative learning. Learning is often understood, particularly in childhood, as simply a formative process of acquiring incoming knowledge and adding it into existing perspectives of meaning. As learners develop, however, their capacity to challenge the validity of new knowledge grows, as does an ability to create new intentional experiences. This capacity to construct new meaning from experience enables learners, particularly adults, to enter into what Mezirow (2000) defines as transformative learning. Cranton (2002) offers a simple explanation of transformative learning theory:

Through some event, which could be as traumatic as losing a job or as ordinary as an unexpected question, an individual becomes aware of holding a limiting or distorted view. If the individual critically examines this view, opens herself to alternatives, and consequently changes the way she sees things, she has transformed some part of how she makes meaning out of the world. (p. 64)

*The Context Lens—Kegan’s Constructive-Developmental Approach*

The context lens of adult learning theory refers to the context within which learning occurs, the interactive and structural dimensions of adult learning. Adults are not simply individual learners unto themselves; rather, the social surroundings and physical setting, a notion called *situated cognition*, affect their learning. In this contextual view, adults learn as they participate by interacting with the community, the tools of learning, and the moment’s activity. Engaging in situated cognitions requires communities of practice such as internships, apprenticeships, and service learning. A key sensitivity raised by the context lens is awareness of how relationships of power across race, gender, class, disability, and sexual orientation affect the ability of adult learners to participate actively in the learning process. Adult educators need to need to be cognizant of these forces and advocate for an inclusive learning context.

Kegan’s (2000) constructive-developmental approach to adult learning can be viewed through the contextual lens. Kegan’s view is based upon two premises about adult learners—constructivism and development. Humans are actively constructing reality, and the very principles with which humans do the constructing can change. Kegan describes this as the difference between informative learning and transformative learning. Informative learning consists of what we know and is aimed at increasing our fund of knowledge, repertoire of skills, and already established cognitive capacities. Yet, adult educators are challenged to promote learning aimed not only at changes in *what* we know, but in changes in *how* we know. “Informative Learning involves a kind of leading in, or filling of the form.... Transformative Learning, [on the other hand], puts the form itself at risk of change (and not just change, but increased capacity)” (p. 49).



Kegan (1994) is particularly interested in the structure of an adult's thinking and how to foster higher levels of consciousness. Kegan suggests that educators need to encourage students to operate out of a "self-authorizing mind" in order to live successfully in an adult world. In today's world, adults have extraordinary demands placed upon them by the multiple roles they play in both their personal world of home and family and their public worlds of work and community. These "mental demands of modern life" necessitate continued adult development, transitioning from concrete views of the world to more abstract frameworks or self-authorship. In negotiating the complexity of our daily environment and the complicity of ourselves, mature thinkers can tolerate ambiguity and operate from a higher level of consciousness.

Several adult educators propose that this type of dialectical thinking is the signature of mature adult thinking. Dialectical thinking "allows for the acceptance of alternative truths or ways of thinking about similar phenomena that abound in everyday adult life" (Merriam & Caffarella, 1999, p. 153). For Kegan, striving for this type of development should be the primary agenda for adult learning.

Likewise, Parks (2007) suggests that the role of higher education is to advance the paradigm shift from a consumerist model of education to a model which cultivates humanity. Parks contends that adult educators must promote citizenship and self-authorization by mentoring students to shift their thinking from conventional to critical; from interpersonal to systemic ethics; from trusting authority to discernment; from gut assessment to instruments; from certainty to Mystery; from good self to complicit self; from tribe/centrism to complex community. "Most students are unaware of their agential reach

into their own lives. Mentoring can help students transition from consumerist, informational learning to self-authoring, transformational learning” (Parks, 2007).

### *More about Transformative Learning Theory*

Within the multi-lens learning theories framework put forth by Merriam and Caffarella (1999), the one most central to this study is transformational learning theory. In developing transformative learning theory, Mezirow (2000) was influenced by theorists such as Jurgen Habermas (critical theory), Roger Gould (psychiatry), and Paulo Freire (anthropology). Furthermore, components of Mezirow’s transformative learning theory can be derived from key concepts found in a number of adult learning theories, including personal and cognitive development theories (Silverman & Casazza, 2000).

### *General Understanding*

Transformational learning theory is an amalgamation of conceptual influences derived from multiple disciplines and various learning theories; it is still evolving today. Jack Mezirow’s landmark study in 1978 of women returning to college marks the germination of this influential adult education theory. Mezirow found that the women could affect a change in their assumptions and expectations through critical reflection, which constituted a learned transformation. In Mezirow’s words, “learning is understood as the process of using a prior interpretation to construe a new or revised interpretation of the meaning of one’s experience as a guide to future action” (Mezirow, 2000, p. 5).

### *Core Concepts*

*Making-meaning as a learning process.* The result of transformative learning process is a freedom to act on one’s own purposes, values, and meanings, rather than relying on those we have assimilated blindly from others. Since adult learners have many roles to

contend with—being students, parents, employees, community members—their early interpretations of meaning learned as children are typically no longer adequate. Adults may then embark upon a process by which they transform:

taken-for-granted frames of reference (meaning perspectives, habits of mind, mind-sets) to make them more inclusive, discriminating, open, emotionally capable of change, and reflective so that they may generate beliefs and options that will prove more true or justified to guide action. (Mezirow, 2000, p. 8)

Kasworm (2003) also suggests that meaning-making is a unique challenge for adult learners. “The challenge of learning is both to incorporate new knowledge into current knowledge structures and to modify past models into new conceptual structures of knowing the world” (p. 82). The essence of adults’ experience is meaningful learning.

*Domains of learning.* Adult learning has many dimensions. It can be viewed as political rebellion against the status quo, freedom from illiteracy, gaining problem-solving strategies to meet self-help needs, and acquisition of desired workplace knowledge, skills and abilities (Cranton, 1994). Mezirow’s (2000) domains of learning are based on the work of Habermas and consist of instrumental, communicative, and transformative learning (p. xiii). Instrumental learning is cause-and-effect, objective knowledge derived from scientific methodologies and is used to control and manipulate the environment. Communicative learning involves understanding ourselves, others, and the social norms of the community. Communicative knowledge is learning to understand the meaning of what is being communicated and is derived through language and consensus (Cranton, 2002; Mezirow, 1997). Learning often involves both aforementioned domains. Learning may also be transformative which is not mutually exclusive to either instrumental or communicative domains of learning.

*Emancipatory learning.* Most often transformative learning is emancipatory and experienced as a process of removing constraints. Emancipatory learning is “a process of freeing ourselves from forces that limit our options and our control over our lives, forces that have been taken for granted or seem as beyond our control” (Cranton, 1994, p. 16). Emancipatory knowledge is gained through critical reflection upon one’s assumptions and not merely knowledge gained from technical and practical learning. Both Cranton (1994) and Mezirow (2000) suggest that emancipatory learning is often transformative and reflects the primary goal of adult education.

*Reflective discourse and critical reflection.* In order for one to engage in transformative learning, s/he must have the capacity for reflective discourse and critical reflection. “Discourse is the process in which we have an active dialogue with others to better understand the meaning of experience” (Mezirow, 2000, p. 14). Reflective discourse provides a lens of critical assessment to view one’s underlying assumptions. To be able to fully and freely participate in discourse, learners must have accurate and complete information, be free from coercion, be objective and open to alternative points of view, be empathetic toward others, and be willing to disclose and to seek greater awareness of the underlying assumptions which may be inaccurate (Cranton, 1994; Mezirow, 2000).

*Meaning structures/habits of mind.* Meaning structures are frames of reference which result from habitual ways of interpreting experience. Human beings develop habits of mind, a set of assumptions that filter how one perceives the world based upon past experience. Habits of mind become expressed as points of view, comprised of meaning schemes which shape one’s expectations, beliefs, feelings, attitudes, and judgments. Since these meaning

structures are typically automatic and unconscious, one becomes aware of them only through critical reflection.

*Types of meaning perspectives.* Mezirow (2000, p. 17) identifies several broad orientations which act as predispositions when interpreting the meaning of experience: (a) sociolinguistic (cultural norms); (b) moral-ethical (moral norms); (c) epistemic (knowledge and learning style preferences); (d) philosophical (religious doctrine and philosophical worldview); (e) psychological (self concept and personality traits); and (f) aesthetic (values, tastes, standards, aesthetic judgments). Cranton (1994) contends that how we see the world is a product of only three meaning perspectives which pertain to: (a) our knowledge about the world (epistemic), (b) the culture within which we live (sociolinguistic), and (c) our own personal nature (psychological).

#### *The Process of Transformation*

The main objective in transformative learning is to adapt dysfunctional meaning structures to become more dependable frames of reference. Hence, adult learners come to better understand their experience by defining a problem, reframing it, and generating options for action based upon interpretations of meaning that are more justified than those of their youth.

*Perspective transformation.* How does one go about the actual process of transformative learning? While the experience of transformative learning cannot simply be prescribed by either learner or educator, understanding its process can enable one to be more open to the potential of learning that is indeed transformative. Mezirow defines perspective transformation as:

The process of becoming critically aware of how and why our presuppositions have come to constrain the way we perceive, understand and feel about our world; of reformulating these assumptions to permit a more inclusive, discriminating, permeable, and integrative perspective; and of making decisions or otherwise acting on these new understandings. (1990, p. 14)

Thus, the learning process involves changing the transforming perspectives by elaborating existing frames of reference, by learning new frames of reference, by transforming points of view, or by transforming habits of mind.

*Overcoming distorted assumptions/premises.* Meaning perspectives are made up of sets of meaning schemes consisting of specific knowledge, beliefs, value judgments, feelings, and assumptions. Any of these can be distorted. Perhaps one could say they are errors in learning. Cranton (1994) notes, however, that “it is more useful for the educator to think of a distortion as an unquestioned, unexamined, perhaps even unconscious assumption that limits the learner’s openness to change, growth and personal development” (p. 30). In striving toward transformative learning, learners must overcome distorted assumptions through critical reflection.

*Objective and subjective reframing.* Transformative learning occurs through objective or subjective reframing of problems. Objective reframing entails critical reflection on the assumptions of others, whereas subjective reframing involves a critical self-reflection of one’s own assumptions. “Becoming critically reflective of the assumptions of others is fundamental to effective collaborative problem posing and solving. Becoming critically reflective of one’s own assumptions is the key to . . . learning for adapting to change” (Mezirow, 1997, p. 9). Examples of subjective reframing include applying insight from

another's experience to oneself, consciousness-raising about justice issues, and becoming aware of how one learns best.

*Self and identity.* Adult learners have an especially rich background of previous learning experiences which, if acknowledged, can enrich the learning experience by making it reciprocal. For this to happen, educators must strive both to understand how individuals differ and to encourage adult students to share their sense of self and identity. According to transformative learning theory, "learners bring certain schemata or meaning systems composed of sets of beliefs or assumptions based on their experiences" (Mezirow, as cited in Silverman & Casazza, 2000, p. 21). By engaging in a process of critical reflection, students become able to ascertain meaning from lessons being taught as relevant to their existing schemata.

If the new information is discrepant with a student's meaning systems, they may choose to change their current ways of thinking. Thus, awareness of self-identity and the history it brings to bear on the learning experience influences both the process and product of learning. At the same time, the learning experience can bring about change in one's sense of self. For example, if a student realizes that he usually avoids risk and consequently has not registered for courses in academic areas unfamiliar to him, he may push himself to enroll in courses outside of his comfort zone, an action that could not only result in new learning, but in a different sense of self.

*Phases.* Mezirow identified several phases of meaning one typically traverses through toward transformation: (a) a disorienting dilemma; (b) self-examination with feelings of fear, anger, guilt or shame; (c) a critical assessment of assumptions; (d) recognitions that one's discontent and the process of transformation are shared; (e)

exploration of options for new roles, relationships, and actions; (f) planning a course of action; (g) acquiring knowledge and skills for implementing one's plans; (h) provisional trying of new roles; (i) building competence and self-confidence in new roles and relationships; and (j) a reintegration into one's life on the basis of conditions dictated by one's new perspective (2000, p. 22). In essence, the learner experiences disequilibrium in his or her thoughts and may experience painful or uncomfortable emotions, which then result in a critical discernment of what makes sense. If transformation occurs, the learner is able to reframe the problem and reintegrate his or her experience into a different, more sensible framework.

#### Adult Development Theories—an Integrative Perspective

Adult learning and adult development are intertwined. Like adult learning theory, adult development theory is extremely diverse and complex, and no one theory can fully capture the nature and process of development in adulthood. Clark and Caffarella (1999) describe a four-fold framework of adult development theories. The *biological perspective* acknowledges that we are physical beings who change physiologically through natural aging, the environment, our own health habits, by accident, or by disease. The *psychological perspective* focuses on how we develop as individuals through internal development processes such as cognitive, moral, and spiritual development. Theories with a *sociocultural perspective* propose that the social and cultural aspects of our lives, such as race, gender, and social class, are the primary forces that drive growth and change in adulthood. Adult development is perhaps best viewed through an *integrative perspective* in which the complexities of adult development are viewed by looking at how multiple perspectives intersect and influence each other.



There has been a shift in the adult development literature toward integration and multiplicity of thought (Caffarella et al., 2000). Modern scholars of adult development argue for a more holistic view of development rather than fixating on one grand theory or a single-dimensional approach. Consequently, this review examines adult development from an integrative psychological perspective. More specifically, as shown in Figure 2.1, adult learning is juxtaposed with adult development. Three alternative ways of thinking about adult development, which are most pertinent to adult learners in this study, include: cognitive development, psychosocial development, and spiritual development.

#### *Adult Cognitive Development*

Epistemology refers to our ways of knowing. Educators must be deliberate about knowing learners' understanding of what knowledge is and how they approach the task of learning, because understanding the intellectual abilities of adults and how they know is important to foster transformative learning in adult learners. Kegan (2000) summarizes this notion nicely: "Genuine transformational learning is always to some extent an epistemological change rather than merely a change in behavior repertoire or an increase in the quantity or fund of knowledge" (p. 48). He goes on further to say that the epistemological change of adult transformative learning "is a call for a particular epistemological shift, the move from the socialized to the self-authoring mind" (p. 65).

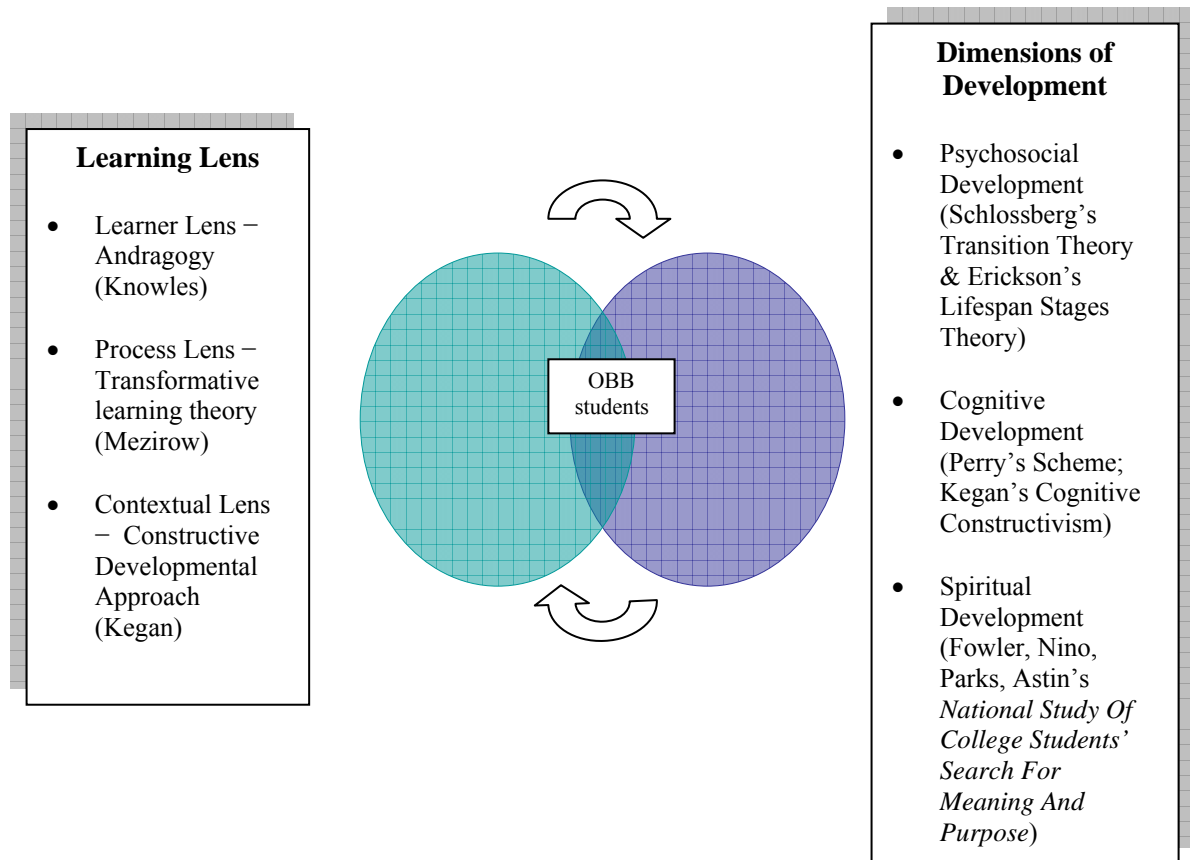


Figure 2.1. Theoretical Framework

That epistemological shift is also explained in William Perry’s scheme of intellectual and ethical development. According to Perry’s theory, college students—including adults—“journey” through nine “positions” of increasing growth and intellectual (and moral) development. These stages are representative of the student’s attitude towards knowledge. The nine positions are grouped into four developmental categories: (a) dualism, (b) multiplicity, (c) relativism, and (d) commitment (Daloz, 1986).

### *Dualism/Received Knowledge*

Students in the dualism stage are poised to receive knowledge. In the first position, they are convinced that there is a basic duality in which all problems are solvable with right or wrong answers. The student sees the world in terms of we-right-good vs. other-wrong-bad. Knowledge and goodness are quantitative, discrete, and known by those in authority. Therefore, the student's task is to collect the right solutions through hard work and obedience. The second position in the dualism stage, full dualism, is slightly more advanced in that the student perceives diversity of opinion. Some authorities (literature, philosophy) disagree while others (science, math) agree. Therefore, there are right solutions to be learned, but some teachers' views of the truth are obscured and must be ignored.

### *Multiplicity/Subjective Knowledge*

In the second developmental stage of multiplicity, knowledge is conceived as largely subjective. There are conflicting answers; therefore, students must begin to trust their "inner voices," not simply external authority. In position three, early multiplicity, students accept diversity and uncertainty as legitimate but only because a solution is not known yet. The student's task then is to learn *how to find* the right solutions. In position four, late multiplicity, the student recognizes that legitimate uncertainty and diversity of opinion exist and, consequently, everyone has a right to his own opinion.

### *Contextual Relativism/Procedural Knowledge*

The third developmental stage of contextual relativism is one in which all proposed solutions are viewed in context and supported by reasons. In positions five and six, precommitment, students learn to evaluate solutions and make some commitment to choices of solutions because some are perceived as better than others.

### *Commitment/Constructed Knowledge*

The final stage of intellectual development consists of an integration of knowledge learned from others with one's own experience and reflection. In position seven, the student makes an initial commitment in some area. In position eight, the student experiences challenges to commitment when examining the implications of commitment and related issues of responsibility. Finally, in position nine, which is post-commitment, the student comes to realize that commitment is an ongoing, evolving activity in which an identity among multiple responsibilities is affirmed.

### *Adult Psychosocial Development*

The psychosocial perspective of adult development focuses on how we develop as individuals and examines primarily internal developmental processes, including how the environment may shape this internal sense of self or inner being.

### *Lifespan Development—Erikson's Psycho/Social Stages*

The psychological development of humans throughout the lifespan is often portrayed in sequential models in which life is viewed as unfolding in major stages or phases. Some theorists equate these changes to age parameters, whereas others view them as tied to the resolution of key dilemmas or completion of tasks or responsibilities. The details of Erik Erikson's biological-cultural interaction perspective follow.

*Framework overview.* Erikson's (1902–1994) theory emphasizes developmental change through the human life cycle. He proposed eight stages of development, each with a dominant psychosocial crisis which must be resolved to continue one's healthy growth. Each stage consists of two opposing forces—a systonic force and a dystonic force—that must be brought into balance (Erikson, 1980). The first five stages occur from infancy through

adolescence: (a) trust versus mistrust, (b) autonomy versus shame and doubt, (c) initiative versus guilt, (d) industry versus inferiority, and (e) identity versus role confusion. Three additional stages pertain to development during adulthood: (f) intimacy versus isolation (young adulthood), (g) generativity versus stagnation (middle age), and (h) integrity versus despair (old age). All eight of the psychosocial stages are rebalanced at every major stage of personality development (Brennan, 2002). The two final stages are most relevant to the adult population in this study. OBB are shifting developmentally from stage seven (generative versus stagnation) to stage eight (integrity versus despair).

*Generativity versus stagnation.* The primary concern in middle adulthood is generativity, assisting the younger generation in developing and leading useful lives. If one fails to do this successfully, they experience stagnation.

*Integrity versus despair.* The final stage of Erikson's developmental model is typically experienced in late adulthood. At this point, older persons tend to look back and evaluate what they have done with their lives. If positive choices for growth and crisis resolution in previous stages occurred, integrity will be achieved. If not, then one will experience feelings of despair and a negative outlook.

#### *Life Events Transitions—Schlossberg's Transition Model*

Another means of categorizing the psychosocial development of adults is through life events or transition models (Caffarella et al., 2000). Particular events or periods of a person's life are seen as driving development such as birth, marriage, and death. The process of these life transitions fosters learning and development. Schlossberg's transition model was originally developed by Nancy K. Schlossberg in 1981 and revised with colleagues Waters and Goodman in 1995 and 2006. Schlossberg offers a conceptualization of the

transition process and provides suggestions for appropriate interventions for adults in transition. Schlossberg (as cited in Evans, Forney, & Guido-DiBrito, 1998, p. 111) writes:

A transition can be said to occur if an event or non-event results in changed assumptions about oneself and the world and thus requires a corresponding change in one's behavior and relationships. . . . a transition exists only if it is so defined by the individual experiencing it.

*Types of transitions.* The theory distinguishes among three types of transitions: (a) anticipated transitions, those that are predicted to occur; (b) unanticipated transitions, those not expected; and, (c) nonevents, those related to unfulfilled personal aspirations. Nonevents can cause further transitions such as those felt because of the nonevent of someone else (rippled transitions), those caused by another event (resultant transitions), and those still anticipated to occur (delayed transitions).

*Perception.* Regardless of the type of transition or nature of the nonevent, an experience is only considered a transition if it is perceived as such by the person involved. Aspects of perception include: (a) context, an individual's relationship to the transition; (b) impact, determined by the degree to which a transition alters the person's daily life; and (c) the amount of time it takes a person to move in, move through, and move out of a transitional event.

*The four s's.* Central to the theory are four major factors that influence a person's ability to cope with a particular transition. These four components—*situation, self, support,* and *strategies*—are known as the four s's. Each person's ability or inability to cope successfully with transitions depends on their unique interpretation of the situation, their sense of self, the support available to them, and the coping strategies available in their repertoire. Thus, different individuals react differently to the same type of transition, and the

same person may react differently at different times. The main premise of the transition theory is that the balance of an individual's assets and liabilities in each of the four s's determines how well he or she will cope with a transition.

### *Adult Spiritual Development*

Current scholarship points to spiritual development as a contributory factor in healthy mental and emotional well-being as well as positive identity development across the lifespan (Brennen, 2002; Lindholm et al., 2006; Wink & Dillion, 2002). There are two broad models of spiritual development applicable to the second half of adulthood (Wink & Dillion, 2002). The first model draws the connection between spirituality and older age in terms of adversity and constraints. Disengagement and limiting life choices caused by the aging process create a deeper capacity and desire for the transcendent. Adverse social conditions and losses, often found later in life, also lead one to focus more on spirituality.

The second model of adult spiritual development centers on the notion of spiritual growth as a positive outcome of normal maturation. Around midlife, individuals typically begin to turn inward to explore the more spiritual aspect of the self. According to Wink and Dillion (2002), middle-aged and older adults are moving beyond the linear and logical modes of comprehending reality to a newly evolved way of "viewing the world [that] embraces the notion of paradox and incorporates feelings and context as well as logic and reason in making judgments, a turn that is conducive to spiritual quest and yearnings" (p. 80). Perhaps the best known comprehensive lifespan perspective on the spiritual maturation process is Fowler's work (1981).

### *Fowler's Stages*

Fowler's (1981) theoretical formulation of individual faith development is based upon interview data from hundreds of adults. Similar to Erikson's psychosocial stages, Fowler examined spiritual development across the lifespan. Seven transitional stages from infancy through midlife and beyond reflect the individual's understanding of self in relation to others. The first four stages, relevant to childhood and adolescence, include undifferentiated faith, intuitive-projective faith, mythic-literal faith, and synthetic-conventional faith.

Adult faith formation starts with young adults in the individuative-reflective stage. They desire to integrate the worldviews of self and others and begin to exhibit a unique, individualistic worldview through independent critical thinking. Adults in midlife and beyond have a conjunctive faith and desire to reconcile the untransformed world with their personal vision and loyalties. They have an increasing appreciation of symbols and myths and seek meaningful learning experiences. Few adults reach the final stage of universalizing faith. With the loss of egocentric focus, adults in this stage actively seek to transform the social order for the common good. Spiritual maturation is comparable to cognitive maturation in that growth occurs in the context of relationships to and with others including the transcendent (Cartwright, 2001; Tisdell, 2001).

With the approach of a new postmodern century, these past two decades have seen an increased emphasis on spiritual matters emerge from the secular community (Ellingson, 2001; Nino, 1997; Wink & Dillion, 2002). This is evidenced by the fact that 82% of Americans polled in 1998 believed that they need to experience spiritual growth (Gallup & Lindsay, 1999). Indeed, a "case can be made that we are living in times whose materialistic



context confounds individuals who seek a vision of a full life to which they can be faithful. Consequently, interest in spirituality is rapidly gaining momentum” (English & Gillen, 2000, p. 1).

### *Defining Spirituality*

While many adult educators believe spirituality to be a key link between adults’ quest for meaning and commitment to the common good, most do not assume that spirituality is the same as religiosity (Astin, 2004; English & Gillen, 2000; Tisdell, 2001). Indeed, “a consistent finding in recent research on religiosity in the U.S. is the growing division between organized religions and spirituality” (Ellingson, 2001, p. 257). Spirituality is viewed as a personal transcendence over one’s immediate circumstances with a sense of interconnectedness with others and a sense of purpose and meaning in one’s life (Brennan, 2002; Lindholm et al., 2006). Religion, on the other hand, pertains to abiding by a set of beliefs, rituals, and practices associated with a particular creed, denomination, or sect. Religion may be an outward expression of the inner spiritual life; one can, however, be spiritual without being religious, and not all who claim to be religious are sensitized to the inner life of spirituality (Tisdell, 2001, 2007).

Most writers in adult education also describe spirituality as something more than personal development. They understand spirituality to be both inner- and outer-directed and define spirituality as “an awareness of something greater than ourselves . . . [that] moves one outward to others as an expression of one’s spiritual experiences” (English, 2005, p. 1171). Astin (2004) similarly defines the spiritual domain as having to do with human consciousness.

What we experience privately in our subjective awareness. It is concerned with the values that we hold most dear, our sense of who we are and where we come from, our beliefs about why we are here—the meaning and purpose that we see in our work and our life—and our sense of connectedness to each other and the world around us. (Astin, 2004, p. 35)

Likewise, Tisdell (2007) describes spirituality as multifaceted: (a) a connection to what is discussed as the Life-force, God, a higher power or purpose, Great Mystery; (b) ultimate meaning-making and a sense of wholeness, healing, and the interconnectedness of all things; (c) the ongoing development of one's identity (including one's cultural identity) moving toward what many authors refer to as greater "authenticity;" and (d) how people construct knowledge through largely unconscious and symbolic processes, manifested in image, symbol, music, and other expressions of creativity which are often cultural (p. 535).

#### *Dimensions of Spirituality*

Despite the increasing awareness about the importance of spirituality to human growth and development, the difficulty in defining it poses challenges for researchers, educators, and human service providers alike. To grasp such a complex topic, it is helpful to view spirituality in multidimensional terms, for "Spirituality is not a unitary construct, it probably has several components, and it can be manifest or expressed (and measured) in different ways" (Astin & Keen, 2006, p. 1). Three dimensions of spirituality are particularly relevant to understanding the development of the OBB in this study: (a) belief in other(s), (b) meaning-making, and (c) the spiritual quest.

*Belief in other(s).* For many, spirituality connotes a relationship with a Higher Presence greater than oneself (Nino, 1997). Often, this belief is expressed in practices of religious engagement and/or spiritual habits such as meditation. According to the *National Study of College Students' Search for Meaning and Purpose*, conducted by the Higher

Education Research Institute [HERI] (2005), 77% of traditional aged college students claim that all are spiritual beings, and 71% gain strength by trusting in a Higher Power. This belief in the transcendent is also reflected in the population of adults in general. For example, in a recent AARP report, *Thoughts on the Afterlife among U.S. Adults 50+*, almost all respondents (94%) said they believe in God (Koppen & Anderson, 2007).

*Meaning-making.* Meaning-making, another dimension of spirituality, is an active reasoning process which requires an individual to formulate questions and answers of his or her own. Meaning-making is a central theme throughout adulthood and requires an introspective capacity to see and search beyond the material aspects and the impermanence of things in life (Nino, 1997). Astin and Keen (2004) refer to this capacity as equanimity, the ability to frame and reframe meaning under stress while maintaining a sense of centeredness. Equanimity means being able to find meaning in times of hardship, feeling at peace, feeling a strong connection with all of humanity. Meaning-making leads one beyond egocentric perspectives toward higher states of consciousness toward a transcendent or “world-centric” sense of self. Parks also contends that meaning is perceived in the connectedness of all things and evokes a commitment to the common good (2000).

*Spiritual quest.* Several adult educators perceive meaning-making in adult learning as related to the spiritual quest of adults (Vella, 2000; Zinn, 1997). Religion and spirituality have become one more resource for the development of self and shifted to an understanding of the self in what Roof calls a “quest culture.” In this culture, “the focus is on self-growth, self-healing, self-realization driven by the desire to reintegrate personal and collective experiences of a religious nature with other aspects of social and personal life” (Roof, 1993, p. 62).

Scholars in human sciences view one's spiritual quest as the form of existential engagement that emphasizes individual purpose and meaning-making within one's work. Spiritual quest entails honestly facing existential questions in all their complexity so that one's internal insights are resolved with one's subjectivity in the world (Klaassen & McDonald, 2002; Lindholm et al., 2006). The primary task of the spiritual quest, according to Nino, is generativity, which he defines as "a fundamental engagement that enables the individual to construct an enduring narrative in an historical context, despite the inevitable impermanence of self and others" (1997, p. 207). Seeking one's spiritual quest answers the fundamental questions of "Who and I?" and "What is my purpose?"

#### *Baby Boomer Spirituality*

The recent surge of public interest in spirituality is attributed by Roof (as cited in Rinehart, 1989) to the Baby Boom generation's quest for personal meaning outside the confines of organized religion. In the period following the social and cultural changes of the 1960s, the American society experienced key changes in religion from an emphasis on community to an emphasis of personal growth; from an external, transcendent God to a God found within individuals; from a reliance on the institution to a reliance on the self in matters of conscience; and from right belief to right practice.

Since Boomers came of age during this time period, it is not surprising that they are a generation distrustful of almost every institution, not excluding organized religion. Despite this, Boomers are spiritually sensitive and still searching for a reawakening of the idealism of their youth (Rinehart, 1989). Older Boomers, in particular, after experiencing the social and political unrest of the 1960s, are driven by ultimate questions about meaning and purpose in life. Raised in a time of material excess, Baby Boomers developed great

expectations from life. Many, however, then became disillusioned with financial shortcomings. Today, Boomers look to spirituality to fill a relational void. They are reaching deep within in hopes to make a meaningful societal contribution through “social-purpose encore careers” (Freedman, 2006).

### Role of Spirituality in Higher Education

Understanding the spiritual characteristics of the Baby Boom generation and how spirituality affects teaching and learning is important to this study. All of these concepts provide a backdrop to understanding if and how the educational and vocational aspirations of Older Baby Boomer students are influenced by spiritual inclinations. A review of the role of spirituality in higher education lends credence to the notion that spiritual development of adult students is indeed connected to their learning goals (Kroth & Boverie, 2000).

Typically, the public academy has disdained the realm of religion and spirituality, viewing their worthiness as less than the rational pursuit of empirical knowledge. “Traditions typically found within higher education have worked against the community, the balance of reason and spirit, and the education of the whole person” (Rendón, 2000, p. 3). “However, spirituality is the eternal human yearning to be connected with something larger than our own egos. This yearning is central to the vocation of higher education” (Palmer, 2007).

Until recently, research about college student spirituality has largely been absent from higher education discourse (Lindholm et al., 2006; Tisdell, 2001, 2007). Recent research conducted about college student spirituality, however, finds that college students today perceive spiritual realities as an imminent context for developmental growth during the college years (Astin, 2004; Astin & Keen, 2006; Chickering, 2006). If this is the case,

than higher education institutions would do well to embrace the spiritual aspirations of students as a critical avenue of educating the whole person. Arguing that spirituality deserves a central place in liberal education, Astin (2004) suggests that human consciousness is one of the most salient features of humanity, and becoming more self aware of one's consciousness is one of the central purposes of education! Astin writes:

Academia has for far too long encouraged us to lead fragmented and inauthentic lives, where we act either as if we are not spiritual beings, or as if our spiritual side is irrelevant to our vocation or work. Under these conditions, our work becomes divorced from our most deeply felt values and we hesitate to discuss issues of meaning, purpose, authenticity, wholeness and fragmentation with our colleagues. At the same time we likewise discourage our students from engaging these same issues among themselves and with us! (2004, p. 38)

Sharon Daloz Parks, in a 2007 presentation entitled *Mentoring Critically Aware Spirituality and Commitment to the Common Good*, challenged educators to look closely at the vocation of American higher education. She called those present to “put the brake” on the consumerist model of higher education, instead focusing on students as “citizens of the whole.” She identified the need to be open to the notion of spirituality—the intuition that we are part of something much larger. She claimed the need to foster in the academy the space for contemplative thinking which is critical to transformation of heart, mind, and soul.

#### Spiritual Dimensions of Education

Others too have stressed the spiritual dimensions of education (Dalton, Chen, & Eberhardt, 2006; Dirkx, 1997; Tisdell, 2001). Integrative education, including models that connect religion and spirituality to the curricular and co-curricular programs on campus, is very much in the consciousness of higher education today. In adult education in particular,

the dedication of theme issues of mainstream journals gives evidence that spirituality has become an integral and relevant concern in the field (English, 2005).

### *Traditional Aged Student Spirituality*

Perhaps the most known research about the spiritual development of traditional aged college students has been conducted at the Higher Education Research Institute (HERI) at the University of California at Los Angeles. In a 2007 presentation entitled *Assessing and Nurturing the Spiritual Life of College Students and Faculty*, the Astins described their six year national project conducted under a major grant from the John Templeton Foundation. Findings thus far from “*Spirituality in Higher Education: A National Study of Students’ Search for Meaning and Purpose*” reveal that about two-thirds of the freshmen consider it “essential” or “very important” that their college enhances their self-understanding, prepare them for responsible citizenship, develop their personal values, and provide for their emotional development. Despite findings indicating a decline in religious practice, the data show a rise in the number of students who say it is very important to: (a) integrate spirituality into their lives, (b) develop a meaningful philosophy of life, and (c) help others who are in difficulty. Nearly half say that it is “essential” or “very important” that college encourages their personal expression of spirituality (Higher Education Research Institute, 2005).

Clearly, traditional aged students have high expectations that college will focus and help them with their personal growth and development. Data from the pilot study, however, suggest that colleges and universities are doing little either to help students explore such issues or to support their search in the sphere of values and beliefs. Astin (2004), Parks (2000), and White (2006) identify several ways to create a spiritual academe for traditional

aged students: (a) shifting emphasis from teaching to learning, (b) focusing on interior of students and seeing the entire educative process more holistically, (c) offering Freshman 101 courses in which students seek deeper connections between their academic work and their sense of meaning and purpose in life, (d) providing service learning opportunities that require individual reflection and collective reflection on the meaning of their experience, (e) providing opportunities for spiritual mentorship from trustworthy authorities, and (f) integrating spiritual intelligence skill building into leadership development programming.

### *Spirituality in Adult Transformative Education*

Until recently, spirituality has also been given little attention in mainstream adult education except for adult religious education. Yet, spirituality is one of the ways that people construct knowledge and meaning. To ignore how spirituality relates to teaching for personal and social transformation is to ignore a central aspect of being human. Spirituality is important to the work of adult learning and meaning-making. (Dirkx, 1997; Tisdell, 2001; Zinn, 1997).

Recent discussions of spirituality in adult education focus on the role of spirituality in teaching and learning (Dirkx, 1997; Tolliver & Tisdell, 2006). “Engaging learning in multiple dimensions, including the rational, affective, somatic, spiritual, and sociocultural, will increase the chances that new knowledge is actually constructed and embodied, thus having the potential to be transformative” (Tolliver & Tisdell, 2006, p. 39). Transformative learning theory has focused on the struggle for meaning and the need to develop more authentic identities through mitigating erroneous, unconscious cognitive assumptions.

Dirkx (1997), however, contends that Mezirow’s transformative learning theory does not go far enough. While it helps us to understand patterns of communication and meaning



of learning which is framed by participants' experiences, learning is portrayed as a problem of critical reflection and disregards the affective, emotional, spiritual, and transpersonal elements of interactions. In Dirkx's words, "Learning is more than the "triumph of reason over instinct, ignorance, and irrationality. . . . transformative learning also involves the way of using very personal and imaginative ways of knowing that involve symbolic, narrative, and mythological," what Dirkx calls *Learning Through Soul* (1997, p. 80).

Others also advocate for a more constructivist form of transformative learning which embraces experiences of mystery, ambiguity, and paradox, and leads to an appreciation of the multiplicity of selves that makes up who we are (Palmer, 1998; Parks, 2007; Tisdell, 2001; Tolliver & Tisdell, 2006). Learning is viewed as a process that takes place within the dynamic and paradoxical relationship of self and other. Hence, coming to know ourselves in the world and how we make sense of the other within this world are critical aspects of learning (Astin, 2004; Dirkx, 1997; Tisdell, 2007)!

### Conclusion

This chapter reviews literature relevant to understanding the experiences and aspirations of older adult students in higher education. A convergence of three national trends is impacting adult education today. First, the number of adult students attending higher education is increasing. Second, employers in many industries are experiencing an urgent workforce shortage in terms of both numbers and skill levels of employees. This reality, in part, is driving people to delay full-time retirement and remain in the workforce for longer periods than typical of past generations. Third, adult learners, particularly Baby Boomers, have massive buying power and, using their united voice, will demand more

proactive policies and accessible provision of adult services in retirement, including access to higher education.

Creating meaningful experiences of higher education for adults requires great innovation, and this is especially true for meeting the growing demands of the number of OBB. This chapter provides an overview of adult education, in general, and adult learners, in particular. Since the processes of adult learning and development are inseparable, relevant theories from both adult learning and adult development are reviewed. Authenticity in learning, for example, entails transformation which is often a spiritual development process. Finally, successful approaches to integrative adult education are mentioned, such as those that support a more holistic approach to education by attending to the cognitive, affective, physical, and spiritual dimensions of development.

Older Baby Boomers face very different issues than traditional aged students, such as end-of-life quality and retirement prospects—issues which may elicit existential questions of one’s purpose and meaning in life. As suggested by Klaassen and McDonald, “the most important direction for future research in this area is to incorporate qualitative research strategies . . . the richness of quest and existential search calls for the sensitivity of qualitative methods to do it justice” (2002, p. 199). The qualitative methodological approach used in this phenomenological study of Older Baby Boomers seeking collegiate degrees is the focus of Chapter 3.

### CHAPTER 3. METHODOLOGY

The purpose of this phenomenological study about adult learners is to describe, explore, and examine the experience of degree-seeking students who are Older Baby Boomers (OBB) at or near retirement age. More specifically, research questions are designed to help one understand the cognitive, psychosocial, and spiritual influences on students' pursuit of collegiate degrees and on their vocational aspirations. Participants' points of view were collected, analyzed, and compared to identify the essence of being a member of the OBB generation who is pursuing formal higher education. Data are interpreted to provide a description of the meaning that students socially construct about their higher education experience, including their reasons for pursuing the experience in the first place.

This chapter provides an overview of the research design and methodology that were implemented to meet the goals of this study. A justification for using a qualitative research approach is followed by an explanation of the epistemological and theoretical perspectives which frame the study. Phenomenology is described as both a philosophical approach and a research methodology. In the methods section of this chapter, the research site and sampling procedures are detailed, followed by an explanation of the processes of data collection and analyses. Next, limitations and delimitations of the study are identified. Finally, the researcher's role and reflexivity are discussed along with the criteria of goodness in this qualitative study.

#### Justification of the Study

The increasing presence of adult learners in higher education makes their pursuit of college degrees a significant issue to research. Adult learners negotiate a system of higher

education that is geared toward traditional aged students (Hagedorn, 2005; Pusser et al., 2007; Pascarella & Terenzini, 1998). As such, adult students are an underserved population in higher education and more needs to be known about them (L. I. Rendon, personal communication, September 14, 2007). Further research is necessary to better understand the reasons OBB are seeking higher education and how institutions of higher education can best support their process of degree completion.

Researching the phenomenon of Older Boomers seeking collegiate degrees is both interesting and relevant. Current demographical changes in the United States make this study especially timely. The increasingly disproportionate number of Baby Boomers who are at or near retirement age is a relatively new reality that is unique to this historical period in the United States (and Japan and Western Europe, for that matter). According to the University Continuing Education Association (as cited in Kiely et al., 2004), the population of those over 60 years old in the United States was expected to grow from 45 million in 2000 to more than 91 million in 2030. The increasing demand made on higher education by adults is accentuated by the expansive Baby Boom generation, the first cohort of which turns 65 in 2011. Although general trends of this generation have been identified, the personal experience of OBB as adult students must be newly explored. This study is significant because of the personal impact that meaningful experiences of higher education could have for OBB students. The goal of understanding this burgeoning higher education population has yet to be fully examined.

Not only is this study significant to understanding the personal experiences of OBB who are adult learners, but the demographic phenomenon of increasing adult learners has profound societal economic impact as well. The majority of OBB desire to stay in the

workforce well beyond typical retirement years and will require upgraded skills and credentials. “The knowledge economy and global industrial production have necessitated postsecondary education—individually and nationally” (Pusser et al., 2007, p. 1). Therefore, further research which illuminates the higher education experience of this cohort is beneficial to understanding the larger issues of workforce and economic development in the 21<sup>st</sup> century.

Both well educated and undereducated members of the Baby Boom Generation will demand access to the higher education system in the United States. On the one hand, never before has a generation been this well educated on average. Nearly 89% of Boomers have high school diplomas, and 28.5% have a bachelor’s degree (MetLife, 2005). Furthermore, according to Kim et al. (2004), prior educational attainment is positively associated with participation in adult educational activities (22 % for those who had not completed high school vs. 66 % for those with a bachelor’s degree or more). Those from the Baby Boom generation who have experienced prior college education will expect educational services that are intellectually rewarding and meaningful.

On the other hand, despite the fact that in the United States postsecondary education has long driven individual social mobility, “the nation’s labor force includes 54 million adults who lack a college degree; of those, nearly 34 million have no college experience at all” (Pusser et al., 2007). Those from the Baby Boom generation without college education will also expect educational services that provide meaningful opportunities of workforce skill development. Adult learners at both ends of the educational continuum will demand social and education policy changes to make higher education a more assessable reality (Bailey & Mingle, 2003).

### Rationale for Qualitative Approach

The dominant paradigm of studying adult higher education aspirations has been quantitative in nature. The use of qualitative inquiry, however, is especially appropriate for studies of adult learners by virtue of the natural emphasis adult education places on learners' experience. The recent surge of studies regarding spiritual development in college students, for example, has also been quantitative in nature and focuses largely on traditional students ages 18 to 24 years. "The most widely used spiritual assessment tools are quantitative measures of pen and paper questionnaires" (Lukoff, Turner, & Lu, 1993, as cited in Hodge, 2001, p. 204). Furthermore, the majority of studies concerning older adult learners has focused on those seeking noncredit and informal education, rather than for-credit, formal education. Hence, this study addresses qualitative research gaps in the higher education literature exploring the concepts of learner aspirations and spirituality of older adult students enrolled in formal degree programs.

While demographic trends in education may be best expressed using quantitative descriptive statistics, qualitative research seems especially appropriate to explore Older Boomers' motivations for pursuing higher education degrees, because it addresses questions of "how" and "why". Using a constructivist approach and basic interpretive theoretical framework to conduct phenomenological research enables researchers to comprehend the complexities of the Older Boomer population cohort and to capture the richness of the interplay between their education and employment aspirations. Understanding the essence of extensive participant narratives that describe personal meaning is an arduous task and best done through phenomenological methodology.

### Characteristics of Qualitative Research

The nature of qualitative research has several common characteristics which are succinctly identified by Creswell (2003). First, it typically takes place in a natural setting such as the participant's home or office so that the researcher can acquire a level of detail about the individual and more readily build rapport and credibility. Second, multiple methods of interactive and humanistic data collection actively involve participants and are conducted with a sensitivity toward the participants' perspectives. Methods traditionally used in phenomenological research include open-ended observations, interviews, document analysis, and use of images (Creswell, 2003). Third, qualitative research is emergent and inductive, rather than prefigured and deductive. Fourth, qualitative research is fundamentally interpretive in that meaning is filtered through the personal lens of the researcher and situated in a social and historical context. Fifth, qualitative researchers view social phenomena holistically and therefore include many facets of a process or central phenomenon. Sixth, the qualitative researcher systematically reflects on who she or he is and acknowledges personal biases, values, and interests in a reflexivity statement. Finally, qualitative researchers use complex reasoning to accommodate activities of collecting, analyzing, and writing up data simultaneously.

As typical in an interpretive research process, in-depth narrative information is attained to describe the meaning, structure, and essence of the lived experience for a person or a group of people (Merriam & Associates, 2002). Since the primary goal of this study is to better understand the subjective perspectives of OBB students and the meaning they attribute to the higher education experience, using a phenomenological framework that affords interpretation of individuals' personal experience is paramount.

Providing rich, thick description is a major strategy to ensure external validity or generalizability in the qualitative sense. This involves providing an adequate database, that is, enough description and information that readers will be able to determine how closely their situations match, and thus whether findings can be transferred. (Merriam & Associates, 2002, p. 29)

### Constructivist Epistemology

Phenomenology as a research methodology is embedded in a theory of knowledge construction called constructivism. In constructivist epistemology, knowledge is socially constructed, truth is relative, and meaning emerges inductively. What is real and meaningful is a construction in the minds of individuals, not an objective truth merely waiting to be discovered. “In this view of things, subject and object emerge as partners in the generation of meaning” (Crotty, 2003, p. 9). Therefore, it is important for the researcher to remain engaged with the participants throughout the activity of inquiring into constructions since, “the findings or outcomes of an inquiry are themselves a literal creation or construction of the inquiry process” (Denzin & Lincoln, 1994, p. 128).

This phenomenological study was framed within the epistemology of constructivism, using an interpretive theoretical perspective to understand the cognitive, psychosocial, and spiritual development of OBB learners. The experiences of higher education as constructed by individual participants were analyzed and constantly compared with other participants within the double contexts of being older adult learners and members of the Baby Boom generation. Thus, a fuller understanding of the meaning, structure and essence of being an OBB and a higher education student was derived throughout the research process.

### Interpretive Theoretical Perspective



As typical of traditional phenomenological studies, this study falls within an interpretive theoretical perspective wherein reality is socially constructed. According to Laverly (2003),

The interpretive framework of inquiry supports the ontological perspective of the belief in the existence of not just one reality, but of multiple realities that are constructed and can be altered by the knower. Reality is not something ‘out there’, but rather something that is local and specifically constructed. (p. 13)

Thus, researchers using interpretive methodologies seek to understand meaning as culturally and historically situated. In phenomenology in particular, the focus is on the essence of meaning that individuals, rather than groups, construct about particular phenomena or experiences, within the constraints of culture.

This interpretive qualitative research approach “emphasizes collecting descriptive data in natural settings, uses inductive thinking and emphasizes understanding the subjects’ point of view” (Bogdan & Biklen, 2003, p. 261). In this study, participant experiences were bracketed, analyzed, and compared to identify the essences of being both an Older Baby Boomer and an adult student seeking a collegiate degree.

#### Understanding Phenomenological Methodology

Phenomenological methodology was used to examine the reality of a higher education trend in which OBB students are returning to school for a variety of reasons, not the least of which may be training for part-time “retirement” careers. More specifically, this study attempted to understand the meaning of the educative, spiritual, and psychosocial experiences of OBB who are pursuing collegiate degrees. To do so, it is helpful to have a fuller understanding of phenomenology.

#### *Defining Phenomenology*

### *The Word Phenomenology*

The word “phenomenon” derives its meaning from the Greek word “phaenesthai” which is to flare up, to show itself, to appear (Dowling, 2007). “It signifies the activity of giving an account, giving a *logos*, of various phenomena, of the various ways in which things can appear” (Sokolowski, 2000, p. 13). Phenomenology, however, is more than simply recognizing the appearance of phenomena. Rather, phenomena are things *as they are given to our consciousness*, whether in perception or imagination or thought or volition. Moran and Mooney explain that, “The expression of ‘phenomenology’ . . . does not characterize the what of the objects of philosophical research as subject-matter, but rather the how of that research . . . it is rooted in the way we come to terms with the things themselves” (2002, p. 278). The motto of phenomenology, “to the things themselves,” seems apropos to its purpose of gaining a deep understanding of one’s subjective experience of something.

### *Phenomenology Defined as Knowledge Approach*

Phenomenology can be defined as an approach to human knowledge. A central tenet in phenomenology is that truth and understanding of life can emerge from people’s life experiences. Humans approach knowledge with claims both in the world and as part of the world. Since the mind and the world are correlated with one another, meaning transcends empirical experience and is constructed by the person perceiving an object. Furthermore, since through language ideal objects can be made evident and known, human beings can come to share a “public mind” with common ideals toward a common good. We are not trapped in our own minds (egocentric predicament) and, instead, can become change agents through the construction of new knowledge (Sokolowski, 2000).

*Phenomenology Defined as Philosophical Approach*

Several parties define phenomenology as a philosophical approach. Moustakas, as cited in Creswell, suggests that “understanding the ‘lived experiences’ marks phenomenology as a philosophy as well as a method, and the procedure involves studying a small number of subjects through extensive and prolonged engagement to develop patterns and relationships of meaning” (2003, p. 15). Likewise, Embree (2001) writes about the historical expansion of phenomenological philosophy to multiple countries and academic disciplines which has resulted in divergent phenomenological movements. The methodology for this study is based largely on the fourth movement, called “hermeneutical phenomenology,” which was influenced by Heidegger, but is also attributed to Hans-Georg Gadamer (1900–2002). This movement contends that human existence is interpretative—that truth and understanding of life can emerge from people’s life experiences. Hence, all assertions and judgments are taken in the context of the background of the assumptions held. Interpretive phenomenology differs from positivism which intends to find causes and formulate laws; it is concerned with understanding a phenomenon rather than merely explaining it.

Dowling (2007) writes of the “new American phenomenology,” a development which fits within the human science disciplines and reflects the value that many modern phenomenologists place on cultural and social contexts of participants’ lived experience. Benner (as cited in Dowling, 2007, p. 127) argues that the goal of interpretive phenomenology is “to look for commonalities . . . in culturally grounded meaning.” Understanding cultural influences both on and from human experience is a paramount

concern to human science researchers who are increasingly utilizing phenomenological research methods.

### *Phenomenology as Research Methodology*

Phenomenology is also defined as a research methodology in which researchers strive to understand the meaning of events and interactions to ordinary people in particular situations (Bogdan & Biklen, 2003). "Phenomenologists believe that knowledge and understanding are embedded from our everyday world" (Byrne, 2001, p. 830). In describing the essence of a phenomenon from the subjective perspectives of those who have experienced it, phenomenology aims to understand another's experience of a reality and how he or she constructs its meaning (Merriam & Associates, 2002). Thus, the focus is for the researcher to stay with the experience itself, "to concentrate on its character and structure rather than whatever it is that might underlie it or be causally responsible for it" (Cerbone, 2006, p. 3).

In qualitative research studies it is important that the methodological grounding is appropriate to the research question (Maggs-Rapport, 2001; Drew, 2001). One uses phenomenological research methodology to address:

questions about common, everyday human experiences . . . experiences believed to be important sociological or psychological phenomena of our time or typical of a group of people . . . and transitions that are common or of contemporary interest. (Tesch, as cited in Merriam & Associates, 2002, p. 93)

The object of the phenomenological research method is to describe the full structure of an experience lived, particularly what the experience meant to those who lived it. Thus, the "thrust of phenomenological research remains oriented to asking the question of what is the nature of this phenomenon as an essentially human experience" (van Manen, 1997, p. 62).

### *Descriptive vs. Interpretive Phenomenology*

Phenomenology as a research methodology can be descriptive or interpretive. While Husserl is known as the founder of phenomenology and utilized a methodology that would be considered descriptive phenomenology, other phenomenologists, beginning with Heidegger, gravitated toward a more interpretive stance. To understand the interpretive phenomenological methodology utilized in this study, it is helpful to compare and contrast descriptive and interpretive phenomenology.

#### *Descriptive Phenomenology*

“For Husserl, the aim of phenomenology is the rigorous and unbiased study of things as they appear in order to arrive at an essential understanding of human consciousness and experience” (Dowling, 2007, p. 132). Husserl regarded experience as the fundamental source of knowledge. Husserl proposed “constitutive or transcendental phenomenology.” His approach takes the intuitive experience of phenomena and tries to extract from it the essential features of experiences, also known as the essences. “He contended that bracketing, the setting aside preconceived notions, enables one to objectively describe the phenomena under study” (Bryne, 2001, p. 830).

Maggs-Rapport (2001) outlines several distinctive features of Husserl’s descriptive phenomenology: (a) exploring the way we as subjects know objects; (b) recognizing objects of consciousness as not having a separate existence from us; (c) concentrating on objective phenomena; (d) suspending all belief in the outer world through bracketing; (e) phenomenological reduction (epoche), using free imaginative variation; (f) discovering phenomena exactly as they are presented to consciousness; (g) a search for essences; and, (h) phenomenological description illuminating “essential connections.”

### *Interpretive Phenomenology*

Like Husserl, Heidegger is concerned with the lived human experience. He proposed, however, a different worldview than Husserl, namely that of existential phenomenology, a view of the being behind all things, “a way to interpret experiences of shared meanings and practices embedded in specific contexts” (Byrne, 2001, p. 831). In interpretive phenomenology, the meaning of a type of experience is interpreted by relating it to relevant features of context, such as “historical meanings of experience and their developmental and cumulative effects on individual and social levels” (Lavery, 2003, p. 17).

While Husserl's focus was on the nature of knowledge (epistemology), Heidegger considered the primary focus to be the nature of existence (ontology). Consequently, Heidegger “argues for an existential adjustment to Husserl's writings that interprets essential structures as basic categories of human experience rather than as pure, cerebral consciousness” (Polkinghorne, as cited in Dowling, 2007, p. 133). In this vein, Heidegger and his followers spoke of hermeneutics, the art of interpretation in social and linguistic context (Giorgi, 1997).

Maggs-Rapport (2001) outlines many distinctive features of hermeneutics or interpretative phenomenology: (a) making sense of the world through our existence within it; (b) understanding and interpreting phenomena; (c) “Being-in-the-world,” open to, and inseparable from all that is going on around us; (d) making sense of “Being-in-the-world” through speech and language; (e) incorporating personal prejudice into the hermeneutic endeavor; (f) fusing horizons by acknowledging our historical understanding; and, (g) fusing horizons through the hermeneutic circle, where understanding is circular.

### *Descriptive vs. Interpretive*

In Table 3.1, Giorgi (1992) describes how interpretive phenomenology differs from descriptive in that the primary aim of interpretive research is explanation of data rather than merely description of the “pure consciousness” of data. Initially, Husserl is content to develop descriptive or analytic phenomenology which describes and analyzes types of subjective mental activity. To the contrary, Heidegger places greater value on understanding than description and holds the ontological view that lived experience is an interpretive process (Dowling, 2007). Eventually, Husserl himself takes a transcendental turn in which he embraces a logical theory of meaning that describes and analyzes not only subjective mental activity, but also objective contents of consciousness such as ideas and concepts.

### Phenomenological Research Method

In addition to being a methodology, phenomenology is considered a research method. In phenomenological research, the preferred method of data collection is individual participant interviews. For the phenomenological interview process to be effective, an environment conducive of safety and trust needs to be established at the outset and maintained throughout the project. “It is within the embodied relationship [between the researcher and participants] that the text or data will be generated and interpreted” (Laverly, 2003, p. 19).

Regarding participant selection in phenomenological research, the aim is to select those who have lived experience that is the focus of the study, who are articulate and willing to talk about their experience, and who are diverse enough from one another to enhance possibilities of rich and unique stories of the particular experience (van Manen, 1997).

Participants are asked to describe their experience of the phenomenon in detail. The

Table 3.1

*Interpretative Versus Descriptive Phenomenology*

Interpretative Phenomenology	Descriptive Phenomenology
Validity may involve returning to the subjects themselves for confirmation or denial of the authenticity of the data or using external 'judges' to test the validity of findings.	Going back to the subjects or using 'judges' is not a legitimate validity strategy. The expertise of the researcher and, most importantly, the process of imaginative variation and intuition is the basis of the validity.
Analysis enables samples of varying sizes to be examined.	Analysis as an intensely in-depth process means limits on size are not theoretical but practical. Small sample, in-depth work is preferable.
The interpreter attempts to go beyond the data to account for the data in a complete and noncontradictory manner.	Whatever shows up is described precisely as it shows itself. There is no need to go beyond the data. The descriptivist does not attempt to 'force a closure on something that announces itself as nonclosed.'
The interpreter offers an interpretation of the data to make sense of disparate or ambiguous meanings.	The descriptivist does not try to reduce the data but to describe meanings in their ambiguous, complex and multiple forms.
Data can only be interpreted, because humans are self-interpretative.	If the statement opposite were true then the statement itself would be an interpretation and as such its validity would be weakened
Everything is an interpretation.	Self-interpretation like all other types of interpretation can be described. If data are coherent, coherent descriptions can be made.

Note. Adapted from Giorgi (1992, p. 127).



questions asked in a phenomenological study are generally non-direct and open-ended so as to provide ample opportunity for personal expression by participants. It is critical to allow participants to talk freely so as to enable the interview process to stay as close to the lived experience as possible. It is also important to listen for what is not said in interviews as it is the silence in which one may find what is taken for granted.

Esterberg (2002) outlines the general phases used to analyze qualitative data. Generally, the first step is to organize the abundant data to formulate a description which is intended to mirror and express a participant's conscious experience. Through this process of organization, the researcher immerses him or herself in the data to become familiar with its intricacies. The second step is reduction which is a critical reflection on the description's content. This step entails the generation of themes or categories to identify patterns in the data. The final step is interpretation of meaning, an analysis which can then be presented to others. These methodological steps are described in detail later in this chapter.

### *Components of Phenomenological Research*

Prior to detailing the research design used in this study, it is helpful to have a further understanding of several components which are inherent in the phenomenological research method: the phenomenological reduction, bracketing, horizontalization, and the search for essences.

#### *Phenomenological Reduction*

“*Phenomenological reduction* is the process of continually returning to the essence of the experience to derive the inner structure or meaning in and of itself” (Merriam, 2002, p. 94). The practice of phenomenological reduction was developed by Husserl to help make research findings more precise (Giorgi, 1997; Kleiman; 2004; Maggs-Rapport, 2001).

Husserl claimed that individuals live in a natural attitude and experience the outer “lifeworld,” understood as what individuals experience without resorting to interpretations or reflection (Dowling, 2007). Phenomenological reduction, then, is an attempt to suspend one’s belief in the lifeworld so as to be free to understand the essential features of a phenomenon without reflection on and explanation of its cultural context. Thus, the task is to describe the phenomenon precisely as it is given to the subject, rather than assuming and interpreting its existence as an entity onto itself.

*Bracketing, the Process of Epoche*

Another important task in attaining the phenomenological reduction is that of *bracketing*. “Bracketing, or the process of epoche, allows the experience of the phenomenon to be explained in terms of its own intrinsic system of meaning, not one imposed on it from without” (Merriam & Associates, 2002, p. 94). One brackets past knowledge about the phenomenon encountered, in order to be fully present to it as it is in the concrete situation in which one is encountering it (Giorgi, 1997, p. 4). Moran (2000) compares phenomenological bracketing to the process of a jury member being asked to suspend making judgments and drawing inferences in order to focus exclusively on the evidence that has been presented in a court of law.

According to Kleiman (2004), the purpose of bracketing is to try to assume an attentive and naive openness to descriptions of phenomena, by embracing the uncertainty about what is to come and a willingness to wonder about the experiences found in the descriptions of the participants. “The epoche in phenomenology is simply the neutralizing of natural intentions that must occur when we contemplate those intentions” (Sokolowski, 2000, p. 49). Unlike Husserl, Heidegger did not believe that bracketing one’s experience is

possible. He suggested instead that through authentic reflection, humans can become aware of their own assumptions.

### *Horizontalization*

In phenomenology, “through the medium of language one is able to communicate to others the objects of consciousness to which one is present, precisely as they are presented” (Giorgi, 1997, p. 5). In order to attain a rich, thick description of a phenomenon, it is necessary to engage in *horizontalization*, “the process of laying out all the data and treating the data as having equal weight” at the beginning of the data analysis process (Merriam & Associates, 2002, p. 94). Data are then clustered into nonrepetitious themes.

### *The Search for Essences*

After description of the subject’s experience, a search for the essence of that experience occurs. “An essence is the meaning without which a phenomenon could not present itself as it is . . . those features that cannot be removed and thus what is essential for the object to be given to consciousness” (Giorgi, 1997, p. 6). The search for essences is done using *imaginative variation* which involves examining the data from as many divergent perspectives and varying reference points as possible. The process of imaginative variation eventually yields an identity of essence which transcends the particular subjective experience. This “insight into an essence is called eidetic intuition, because it is the grasp of an eidos or a form” (Sokolowski, 2000, p. 177).

### *Phenomenological Data Analysis*

The essence of phenomenology is discovered through analysis and synthesis of the textual and structural descriptions which are attained through the interview process. Data analysis of transcribed interviews is a time-intensive process comprised of multiple steps

(Devinish, 2002; Giorgi, 1997; Holroyd, 2001; Kleiman, 2004; Merriam & Associates, 2002; Morrisette, 1999). Careful data collection yields thick rich data which can be analyzed to reveal accurate findings. Components of analyzing data in phenomenological research will be identified, followed by a description of typical data analysis techniques used in phenomenology.

### *Structural Forms in Phenomenology*

During phenomenological data analysis, three structural forms appear constantly: the structure of *parts and wholes*, the structure of *identity in manifolds*, and the structure of *presence and absence* (Sokolowski, 2000). Being aware of these forms makes it easier to recognize the potential data themes.

*Parts and wholes.* Wholes can be analyzed into two different parts called pieces or moments. Pieces are independent parts and can remain intact while detached from the whole, such as tires on a car. Moments, on the other hand, do not retain meaning without the whole, such as vision and eyes. The importance of this structure for phenomenology is the realization that the mind and being are moments to each other and cannot be separated out from the whole to which they belong.

*Identity in manifolds.* The theme of identity in manifolds refers to the notion that any identity can be perceived in a multitude of ways. There are many nuances of one and the same thing. “The thing can always be presented in more ways than we already know; the thing will always hold more appearances in reserve” (Sokolowski, 2000, p. 28). The identity always transcends its manifolds of presentation, and by acknowledging the diverse manifolds, we are led, through phenomenology, to the reality and distinctiveness of that

identity. Thus, manifolds of identity become part of the rich, thick description necessary for qualitative exploration.

*Presence and absence.* The structure of presence and absence respectively refers to filled intentions (when an object perceived is present, such as participating in a sport event) and empty intentions (when an object perceived is absent, such as anticipating watching a future sport event). “We live constantly in the future and in the past, the distant and the transcendent, in the unknown and the suspected; we do not live only in the world around us as it is given to the five senses” (Sokolowski, 2000, p. 37). In the study of phenomenology, the absence is a phenomenon to be contended with and is especially important in studying human dispositions and emotions.

#### *Research Design Process*

Giorgi (1997, p. 8) identifies five basic steps that all qualitative research designs go through: (a) collection of verbal data, (b) reading of the data, (c) breaking of the data into some kind of parts, (d) organization and expression of the data from a disciplinary perspective, and (e) synthesis or summary of the data for purposes of communication to the scholarly community. These steps are interpreted in accord with their given methodology, such as phenomenology. Also, the research process may proceed slightly differently based upon the discipline in which the research occurs.

#### *Phenomenological Data Analysis Process*

Once data are collected they must be organized and prepared for analysis. “This involves transcribing interviews, optically scanning material, typing up field notes, or sorting and arranging the data into different types depending on the sources of information” (Creswell, 2003, p. 191). The essence of phenomenology is then discovered through analysis

and synthesis of the textual and structural descriptions which are attained through the interview process. Data analysis of transcribed interviews is a time-intensive process comprised of multiple steps (Devinish, 2002; Giorgi, 1997; Holroyd, 2001; Kleiman, 2004; Merriam & Associates, 2002; Morrisette, 1999).

As described in Bogdan and Biklen (2003), during the data analysis and interpretation process, data are dissected into the smallest units of meaning in order to discover any significant statements of reality from the participant's perspectives. Then, data are pieced back together inductively in new and meaningful ways to produce meanings from the significant statements. Finally, themes of meanings emerge from the data analysis and an exhaustive description of the phenomenon is created.

Likewise, Giorgi (1997) identifies several steps in organizing and preparing the data to be analyzed. Generally, the data are first examined in a holistic manner by reading through all of the data before beginning any analysis. After this global reading, which is designed to obtain a sense of the whole, data are reread slowly and then divided into parts or categories according to meaning discrimination. The identified parts, called meaning units, must be determined by criteria which are consistent with the scientific discipline such as psychology or education. Irrelevant and redundant meaning units are discarded. Meaning units are then integrated in a sensible way, within a logical context. Next, the meaning units are articulated by abstracting themes of meaning from the data themselves. Finally, once the essential meaning units have been identified, the situated meaning structure of the phenomenon is interpreted and expressed in a manner conducive to scholarly understanding.

#### *First Coding*

An initial, cursory content analysis of the data is done after each interview session to guide question development between the sessions. Using N-vivo or open coding, the researcher speculates about initial themes and identifies units of data and the corresponding categories into which they may fit (Merriam & Associates, 2002). When doing the initial open coding, data are pulled together by like categories, from disparate sources. This triangulation of data lends credence and trustworthiness to the study. Each knowledge claim made must be evidenced by warrants, specific data such as direct quotes and participant examples, which support the general concepts induced from the specific data. Seeing trend patterns within and among participants further grounds the data for possible development of future substantive theory.

### *Second Coding*

Strauss and Corbin (as cited in Merriam & Associates, 2002, p. 149) described the process of looking at the data the second time: “Whereas open coding fractured the data, axial coding, or focused coding, puts the data back together in new ways by making connections between a category and its subcategories (identified during open coding) to develop several main categories.” Themes are pieced together inductively from the data collected. This is also the point in the process that data that are not important to the study are eradicated.

### Research Design Used in Current OBB Study

The remainder of this chapter elaborates on the research design components, including the research site, participant selection, data collection methods, data analysis techniques, and the role of the researcher.

### *Research Site*

This qualitative research study occurred at medium sized, public Midwestern university during the 2007–2008 academic year. Participants were enrolled in or had just graduated from the Bachelor of General Studies degree program (BSG) within the College of Public Affairs and Community Service. The BGS degree is offered through the Division of Continuing Studies which provides working students a flexible, individualized degree program backed by experienced advisers who specialize in helping adult students deal with the challenges they meet on the path to a university degree. The BGS degree program at this university is one of the nation's oldest for students 21 or older and the degree has been awarded to over 20,000 students since 1951. All courses are taught by university faculty, and BGS students must meet the same rigorous standards as those in traditional degree programs. The BGS curriculum prepares students to meet a wide range of academic and professional goals.

### *Participants*

The aim in selecting study participants was to select those who have lived experience that is the focus of the study, who are articulate and willing to talk about their experience, and who are diverse enough from one another to enhance possibilities of rich and unique stories of the particular experience (van Manen, 1997).

### *Access to Participants*

I gained access to study participants through the Assistant Dean of the College of Public Affairs and Community Service (CPACS). I had previously garnered permission to approach this individual from her supervisor, the Dean of CPACS whom I know well from



the completion of my MPA degree at this same university. Thus, research access was granted through a gatekeeper dean known to me, an alumna of the university study site.

### *Participant Recruitment*

Prior to interviews, I recruited participants through a letter mailed to all BGS students (from the *Division of Continuing Studies*) who were currently enrolled (or had just graduated) and met the age and credit criteria (see Appendix A). I did not have access to the database of 60 potential participants to protect their anonymity. In the letter I explained the purpose of my study and the requirements and benefits of participation. I followed up by phone with any interested parties who had contacted me to clarify questions they may have about the study and ensure their willingness to participate.

The first request for individual interview participants was followed by another request to nonresponders to consider becoming focus group participants. Thus, while all participants came from the same student population, no participant overlap existed between individual or group interviewees.

### *Participant Selection Process*

I used a purposeful sampling strategy to select 10 students who were enrolled in the BGS degree program. Participants were recruited using a mixture of two sampling strategies commonly used in qualitative research: criterion-based sampling and maximum variation sampling (Creswell, 2003). First, participants had to meet the criteria of age. Participants in this study were students born between 1946 and 1958—in the upper half of the Baby Boom generation—referred to as Older Baby Boomers. Participants for this study also had to have completed at least six credit hours toward their BGS degree.

Once it was established that prospective participants met these criteria and were willing to participate in the study, maximum variation sampling was then used to intentionally select 10 students whose experiences provided the fullest description of the experienced phenomenon. Thus, the aggregate composition of the sample included both male and female participants, of various ages between 50 and 62, studying differing areas of concentration, and pursuing BGS degrees for a variety of reasons such as personal enrichment, career advancement, or career redirection. One individual interview participant dropped out after the first meeting due to her husband's terminal illness. Twenty students of 60 (33%) responded positively to the recruitment letters. Study participants are reflected in the composite profile in Table 3.2.

Ideally, participants chosen were articulate in describing their motivations for higher education and any relationship between their educational aspirations and their future aspirations. Those agreeing to participate in the study were asked to sign consent forms prior to the first interview in accordance with human subjects protocol (see Appendix B).

#### *Data Collection Methods*

“It is incumbent upon researchers to seek methods that fit with the philosophy and methodology of their research question and to choose methods congruent with the research topic and assumptions” (Byrne, 2001, p. 831). Multiple methods of data collection traditionally used in phenomenological research, such as open-ended interviews and document analysis (Creswell, 2003), provided a venue for interactive and humanistic data collection that actively involved participants. Primary data collection methods consisted of three semi-structured individual interviews completed by nine individual interview

Table 3.2

*Participant Profile Summary*

<b>Individual Interview Participants</b>		
<b>Participant Demographics</b>	<b>Number (of 10 total)</b>	<b>Richness of data – maximum variation</b>
Gender		• 5 F and 5 M
Female	5	
Male	5	• Age span 50–62 years*
Ethnicity		
Caucasian	9	• FTE and PTE student status
Hispanic – Puerto Rican	1	
BGS Student Status		• Varying primary attendance purposes
FTE student	2	
PTE student	8	• FTE and PTE employment
Employment Status		
FTE employee	7	
PTE employee	1	
Unemployed	2	• Varying Areas of Concentration
Marital Status		
Divorced	1	
Married	8	* 62 Female dropped from study due to husband’s terminal illness
Single	1	

participants. Secondary data collection methods included an archival data review of BGS program information and journal reflection questionnaires completed by each participant. The data collection process occurred over a timeframe of three months during the 2007–2008 academic year.

During the data collection process, I kept a research journal with frequent descriptive observations and specific procedural and analytic memos in order to provide a detailed audit trail about the methodological process contemplated and actualized. “Procedural memos focus on the nuts and bolts of your research. They summarize exactly what you did”

(Esterberg, 2002, p. 165). Analytic memos, on the other hand, focused on my ideas and best hunches about what the data meant and the connections between cases. This reflective writing throughout the research process provided key information for future insights and research directions. My journal also provided a venue for my own thoughts to both influence and be influenced by the very data I collected.

Data collection methods were shaped by the research questions of this study. To better understand the experiences of OBB pursuing collegiate degrees and the influence of dimensions of adult development on their aspirations for both learning and employment, the following research questions guided the study:

1. What is the experience of OBB students pursuing higher education degrees?  
What past education and future aspirations bring them to higher education?
2. How do the multi-dimensions of adult development—cognitive, psychosocial, and spiritual—influence older adult students’ transformative learning experiences in higher education? Conversely, how does their college learning experience influence their personal growth and development?
3. How do OBB describe and view the role of higher education in supporting their continued development and life transitions?

Seeking the answers to these questions provided a deeper understanding of how degree-seeking students who are nearing retirement age experience college and what learning means to them.

#### *Framework for Data Collection Protocols*

These broad research questions provided an overarching framework for the participant interview and journal protocols used throughout the data collection process (see

Table 3.3). For example, the first individual interview centered on research questions number one and three—understanding participants’ historical education and career paths and the support needs of OBB students in higher education. The second interview and journal reflection activity focused on research question number two—understanding the developmental influences on participants’ educational and future vocational aspirations. Archival data review augmented individual interviews and journal reflection data. Thus, aggregate data acquired from the various data collection methods used provided answers to these broad research questions.

#### *Primary Data Collection Methods*

As mentioned previously, face-to-face, in-person interviews are the preferred method of data collection in phenomenology. As typical in qualitative research, interviews “are intended to elicit views and opinions from the participants” (Creswell, 2003, p. 188). Interviews can be conducted one-on-one or with a group of participants. Interviews provide participants the opportunity to divulge personal perceptions that are difficult to capture in quantitative data collection. They are useful when directly observed behavior cannot provide the information desired, such as historical information of one’s personal experience. Interviews do have limitations. While interviews allow the researcher to control the line of questioning, his or her presence may bias responses. Interviews are also limited in that they are reliant upon participants to be articulate and do not necessarily provide information in a natural field setting (Creswell, 2003).

Table 3.3

*Data Collection Protocol Framework*

Research Methods	Content Focus	Research Question	Framework Source
Primary Methods			
1 <sup>st</sup> Interview	Historical experience of education including higher education expectations	1,3	Esterberg's Interview Guide Adult Learning Theories
2 <sup>nd</sup> Interview	Developmental influences on Educational and Vocational Aspirations	2	Adult Development Theories Cognitive, Psychosocial, Spiritual
3 <sup>rd</sup> Contact	Member-checking & Clarification of Themes	1,2,3	Seidman's Three Interview Approach
Secondary Methods			
Journal Reflection	Experience & Influence of Spirituality	2	Nino's Spiritual Quest Assessment; <i>National Study of College Students' Spirituality</i>
Archival Data	Bachelor of General Studies program information (print/web)	1,2,3	Archival Data Review

For this study, the primary method of data collection was a series of three semi-structured, individual interviews with students who fit the demographics of my

research interest—OBB near retirement age (50–62) and seeking a college degree. To establish an environment conducive of safety and trust, interviews were conducted in a natural campus setting or at the participant’s home or workplace, depending upon their individual preference. Most interviews occurred on the college campus, although some participants chose their home or workplace, environments pertinent to adult students. This enabled the researcher to acquire a level of detail about the individual and more readily build rapport and credibility. All interviews were audio taped (after soliciting permission from participants, of course) and transcribed for accuracy in later narrative analysis and data interpretation.

#### *Semi-structured Interviews*

Primary interview data were collected using Seidman’s three interview approach. According to Seidman, the interview is a structured, three-stage process, which begins by establishing the context of the interviewees’ experience, through to a construction of the experience, and finally a reflection on the meaning it holds (1991). Seidman claims that a basic requirement for phenomenological interviews is the interest that the researcher has for the others’ stories. While my interest in listening to participants’ stories was indeed high, I chose to conduct participant interviews using a modification of Seidman’s interview technique. In this study, a series of three interviews were conducted with each participant. The first two interviews (90 minutes each) were conducted face-to-face, while the third interview (30 minutes) was done via telephone. Each had a unique focus:

1. The first interview protocol was designed to get a sense of past education and work experiences.
2. The second interview protocol focused on future goals and aspirations.

3. The third interview served as a member-checking opportunity to clarify themes found in the data from the first interviews.

While the interviews were semi-structured and based upon interview protocols, the content of interviews was influenced somewhat by the nature of the participant-researcher relationship and the progressive interaction that occurred.

*First interview.* The focus of initial interview questions was on students' general educational histories. The first interview asked questions to attain a general understanding of participants' perspectives on the salient points of their adult higher education experience. Prior to asking questions, I again explained the purpose of my study and answered any questions or concerns participants had which were not already addressed in the initial invitation to participate.

To determine specific questions for the first data collection session, I developed interview questions using a modification of Esterberg's interview protocol guide (see Appendix C). Esterberg (2002, p. 167) identifies a number of directions in which the interview questions can be organized, such as questions about events, chronology, the setting, the people, the processes, and the issues. Since questions probed both for past educational and career experiences and for future aspirations related to the pursuit of higher education degrees, the answers enabled me to begin to know the participants' perspectives of their experience. Both Mezirow's theory of transformational learning and Schlossberg's transition model influenced the design of the first interview protocol.

*Second interview.* The second interviews followed the first interviews by two to four weeks, depending upon the participants' availability. The formulation of second interview questions was guided by several adult development theories to determine psychosocial,



cognitive, and spiritual influences on participants' decisions about college attendance and future careers. Specific questions (see Appendix D) focused on attaining a deeper understanding of the developmental dimensions of the participants' identities. For example, questions were focused to ascertain whether participant aspirations to pursue higher education and future vocations were an inclination toward a spiritual quest. Scholars in human sciences view one's spiritual quest as the form of existential engagement that emphasizes individual purpose and meaning-making within one's work.

*Third interview.* Prior to the third interview (phone contact), participants received a transcription of their first two interviews so that they might confirm that the documents accurately captured their perceptions. The third interview provided an opportunity for participants to expound upon ideas expressed in the first two interviews. This clarification process is known as member-checking (Creswell, 2003) and ensures a researcher that her understanding of participant responses is indeed what they meant to convey.

*Older Baby Boomer Focus Group Interview.* A second source of primary data collected in this multi-method study was a single, self-contained focus group with seven older adult student participants. Although focus group and individual interview participants in this study were mutually exclusive, all participants were recruited from the same original sample. Study results, however, do not include the focus group data because findings from individual interview data were saturated and the focus group data did not add any new information to the study.

#### *Secondary Data Collection Methods*

Secondary data collection enabled me to reach data saturation and achieve data triangulation. Triangulating methods of data collection provides rich, thick description

which results in a manifold view of the data. Examining evidence from a variety of sources enables one to build a coherent justification for themes when writing up the research findings later on (Creswell, 2003). In this study, I utilized two additional methods of data collection which helped to ensure internal validity—an individual journal reflection exercise and a review of archival documents.

#### *Journal Reflection Exercise*

Using a journal reflection exercise as a method of data collection enabled participants to write, rather than simply speak, about their experiences. “Reflection questions are an unobtrusive source of data which participants have given thoughtful attention to compiling” (Creswell, 2003, p. 187). Journal reflection questions focused on understanding students’ experience of spirituality and its influence on their educational and vocational aspirations. This method of private document data collection occurred after individual interviews and via typewritten journal entries (see Appendix E) and responses were emailed back to the researcher.

Since the concept of spirituality is difficult to grasp and often very personal in nature, writing journal reflections provided an opportunity for private reflection, rather than only interactive dialogue, which increased descriptive data collection. The journal reflection questions were based on Nino’s *Spiritual Quest Assessment* (1997), which is an open-ended sentence completion exercise, and the spiritual factors framework used in the *National Study of College Students’ Search for Meaning and Purpose*, research conducted by the Higher Education Research Institute (2005).

#### *Review of Archival Data*

General information about the Bachelor of General Studies degree program was attained from the Division of Continuing Studies website. Additional print materials provided by the academic department also provided pertinent information about degree requirements, course sequencing, and areas of concentration. Reviewing this archival information was important for me to acquire an understanding of the bachelor degree being pursued by student participants.

### Data Analysis and Interpretation

Generally, in the qualitative data analysis and interpretation process, data are dissected into the smallest units of meaning in order to discover any significant statements of reality from the participants' perspectives. Then, data are pieced back together inductively in new and meaningful ways to produce meanings from the significant statements. Finally, themes of meanings emerge from the data analysis, and an exhaustive description of the phenomenon was created (Bogdan & Biklen, 2003; Esterberg, 2002). In this study, I achieved this general pattern of data analysis by following Creswell's six steps of data analysis and interpretation (2003).

Creswell describes the process of data analysis as:

making sense out of text and image data. It involves preparing the data for analysis, conducting different analyses, moving deeper and deeper into understanding the data, representing the data, and making an interpretation of the larger meaning of the data. (2003, p. 190)

Creswell suggests that researchers must also tailor the data analysis to the specific type of qualitative research strategy used. "Phenomenological research uses the analysis of significant statements, the generation of meaning units, and the development of an 'essence' description" (Moustakas, 1994, as cited in Creswell).

### *Organizing and Preparing the Data*

The first step of data analysis and interpretation, according to Creswell, is to organize and prepare the data for analysis. This organization really began long before the first interview with the initial phone contacts to those who had expressed an interest in participating in the study. I had developed a screening questionnaire to get a sense of them as students—such as confirming their enrollment, birth year, and motivations for pursuing higher education. Not only did these initial conversations provide me with an opportunity to explain the study, but I was also able to ascertain whether participants were articulate and variant enough to provide a rich data set.

### *Reading the Data to Gain a Sense of the Whole*

My second step in data analysis was to read through all of the data. All of the interviews were audio taped, after which I had them transcribed verbatim. I listened to each individual's interview to become more fully immersed in the data prior to the next interview so as to be aware of additional questions I should ask in successive interviews. After the transcription was complete, I read through all transcripts in their entirety to get a sense of the whole, simultaneously proofreading to make sure my data were accurate and clean. While doing this, I jotted notes of initial impressions in the margins.

### *Open Coding—Breaking the Data Apart*

My third step was to engage in more detailed analysis by developing a coding process. Guided by the original research questions and my initial noted reactions to the interviews, I created a tentative coding structure (list of topics) that included the following broad categories: (a) spirituality, (b) cognitive development/learning/education experience, (c) future aspirations—both career and retirement, and (d) a psychosocial/description of

person.

Using the aid of Atlas Ti qualitative software, I then completed open coding (Creswell, 2003; Esterberg, 2002) by examining transcribed interviews line by line and coding each smallest meaning unit—be it a phrase, sentence, or paragraph. I assigned each of these meaning units a one-to-three word code which summarized the essence of the concept or idea quoted. Through the process of identifying these self-contained meaning units, I began to notice relevant phenomena in the data.

#### *Focused Coding—Piecing the Data Together*

The fourth step entailed using the “coding process to generate a detailed description of the setting or people as well as categories or themes for analysis” (Creswell, 2003, p. 193). This step of data analysis is also called focused coding (Esterberg, 2002). After assigning all interview data units a specific meaning code, I further refined the preliminary coding scheme. Thus, the experiences of higher education, as constructed by individual participants, were analyzed and constantly compared with other participants to begin to identify common codes and tentative themes.

I reduced the data further to increase relevance to this particular study. “Whereas open coding fractured the data, axial coding, or focused coding, puts the data back together in new ways by making connections between a category and its subcategories (identified during open coding) to develop several main categories” (Strauss & Corbin, as cited in Merriam, 2002, p. 149). Reducing the data in this manner—by grouping topics that related to each other—I was able to see interrelationships within the data which led to identifying themes for analysis. Identifying persistent themes inducted from the data yielded the findings of this study and, ultimately, provided an exhaustive description of the

phenomenon.

Modification of the original coding structure was done by merging codes with overlapping meaning and deleting others if found irrelevant. Nearly 140 initial codes were reduced to less than 100 using several strategies: (a) combining duplicate codes—merging those with similar meaning (e.g., *education path* and *higher education path*); (b) combining like codes which were frequently co-occurring with each other (e.g., *hope* and *optimism*, and *parenting* and *sacrifice for children*); and (c) merging codes into more inclusive categories (e.g., *reading, writing, math* into an *academic skills* code and *face-to-face* and *on-line* into a *delivery modalities* code).

I then used Bogdan and Biklen's (2003) suggestions to develop a variety of coding categories to help me sort the data, such as: (a) definition of the situation codes (e.g., parenting roles); (b) perspectives held by subjects (e.g., shared value of family); (c) subjects' ways of thinking about people and objects (e.g., thoughts about retirement and traditional age students); (d) process codes (e.g., chronology of their educational experiences); (d) activity codes (e.g., work history); (e) event codes (e.g., death of parents, marriage, withdrawal from college for the first time); and (f) strategy codes (e.g., coping skills and study habits). Codes were added as necessary or reworded for clarity. A fuller understanding of the meaning, structure, and essence of being an OBB student was derived throughout the coding process.

In addition to reducing and categorizing codes, I utilized several other methods to continue to develop my qualitative analysis, as summarized in Table 3.4. For example, I looked for patterns in the data, compared cases, built typologies, and conducted a content analysis (Esterberg, 2002; Miles & Huberman, 1984). During the period of systematically

analyzing textual data, I suspended any academic reading of theory so as not to be biased in my interpretation of the data. Careful attention was drawn to staying close to the data, looking at what each participant was telling me in their own words.

The fifth step of data analysis and interpretation was to determine how to represent the description and themes in the qualitative narrative. I began by laying out my three chapters of findings in accord with Schlossberg's chronological concept of transitions—moving in, through, and out of higher education. Then I decided within which chapter the themes fit best, as well as identified subthemes for each of my major themes. In a detailed discussion of themes and subthemes, I used specific quotations from multiple participants to present the data. I also designed tables to convey participant demographical information as well as figures to explain theoretical constructs relevant to the data.

According to Creswell, the final step of data analysis “involves making an interpretation or meaning of the data” (2003, p. 194). Herein, the essence of the phenomenon being researched is articulated. In this study, the fundamental structure of the phenomenon of pursuing higher education degrees, as perceived by these OBB participants, was found to be a self-identified transformative process resulting in improved learner self-efficacy, and acquired within a supportive, adult-friendly higher education environment which enabled students to successfully transition not only toward degree completion and ensuing career enhancements, but toward meaningful vocational aspirations grounded in personal spiritual beliefs. Chapter 7 is comprised of the detail of this interpretation.

#### *Strategies for Validating Findings*

The final step of data analyses, validating the findings, is critical to the trustworthiness of a study. It was important to verify that my interpretation of the data is actually a good one, as

suggested by Esterberg, who wrote, “Before you finish your analysis, you will need to examine your work carefully against the data you have gathered. You want to make sure that the analysis you’ve developed is actually supported by the data” (2002, p. 173).

Table 3.4

*Methods of Data Analysis Used*

Analysis Technique	Description	OBB Study Example
Word count (content analysis)	Frequency of word usage; frequency of how often a particular theme appears; meaning of text, e.g., what fatherhood means	Counting use of the word “failure” when describing first college experiences
Quote Density	Number of cross categorized codes indicates importance	Single quote categorized as cognitive change, transformative learning, and changed self perception
Patterns	Repeated codes; similar events; similar issues; or handling different events and issues in the same way	Patterns of spiritual values – typical of Baby Boom generation
Build Typologies/ Matrices	System for categorizing types of things	Summarizing evidence of transition assets and liabilities – Schlossberg’s four S’s of self, situation, support and strategies
Comparing Cases	Compare found patterns systematically across cases, often using a contract table (Miles and Huberman, 1984, p. 176).	Comparing differences across all participants for higher education support and transformative learning experiences

Multiple strategies were utilized to verify conclusions including triangulation of data, presenting negative or discrepant information, retaining access to participants for continued member-checking, and utilizing both a peer reviewer and an external auditor to develop



intersubjective consensus (Creswell, 2003; Esterberg, 2002; Miles & Huberman, 1984). Finally, extant literature was examined to determine if the thematic trends and patterns found in the data were supported throughout the breadth of literature about the learning and adult development of the Baby Boom generation. This juxtaposition of my findings against national data was more of a deductive process to validate whether my data mirrors national trends.

*Triangulation of data.* “Triangulation is a validity procedure where researchers search for convergence among multiple and different sources of information to form themes or categories in a study” (Creswell & Miller, 2000, p. 126). I triangulated data by gathering evidence from different data sources of information such as one-on-one interviews, reflective journals, and archival data. Data were also triangulated across varying theories of cognitive, psychosocial, and spiritual development. When analyzing data, I gained further insights from meta-statements made by participants as they reflected on their own thinking.

*Presenting negative or discrepant information.* When analyzing my situation-specific data, I paid close attention to any discrepant or negative cases that might disconfirm or challenge my expectations of emerging findings (Merriam, 2002). “Discussing contrary information adds to the credibility of an account for a reader” (Creswell, 2003, p. 196). I also utilized the null hypothesis trick when examining the influence of spiritual development on educational and vocational aspirations: “assuming initially that there is no pattern in the data” (Esterberg, 2002, p. 175). Doing this ensured that any connections of aspirations to spirituality were found and articulated by the participants themselves.

*Retaining access to participants for continued member-checking.* Prior to the end of the data collection process, I completed member-checking while participants were still

participating in the active interviews. Member-checking “consists of taking data and interpretations back to the participants in the study so that they can confirm the credibility of the information and narrative account” (Creswell & Miller, 2000, p. 127). Member-checking ensured that my perceptions of participants’ experiences accurately reflected participants’ actual words and experiences and that what I present as findings will then be plausible to participants and readers alike (Merriam, 2002).

*Prolonged engagement in the field.* I secured permission from participants to remain in contact with them via email and phone after the interview process, while I was writing up the data. By retaining field access beyond the data collection period, I remained engaged with the participants and was able to member-check specific information relevant to the evolving findings. While no new data emerged from this process, some of my perceptions were further clarified, and follow-up questions were answered.

*Utilizing a peer reviewer.* Data collected were augmented by conversations with the senior BGS advisor who is familiar with older adult students and acted as a peer reviewer. As I reviewed initial meaning themes to determine if they were congruent with her experience of OBB students (in general), she became a key informant by providing me with further insight about BGS adult learner characteristics and their educational preferences. A peer reviewer “reviews and asks questions about the qualitative study so that the account will resonate with people other than the researcher” (Creswell, 2003, p. 196). She also read drafts of my chapters to see if my findings made sense. Having the BGS advisor review my tentative interpretations affirmed general patterns that I saw in the data, which were largely congruent with her experience of these learners. Thus, the use of the BGS advisor for peer debriefing enhanced the accuracy of the account.

*Utilizing an external auditor.* To further insure accuracy of the findings, I used an external auditor who reviewed the entire project by reading all interview transcriptions as well as the findings chapters. “This auditor is new to the researcher and the project and can provide an assessment of the project throughout the process of research” (Creswell, 2003, p. 197). This person was familiar with the higher education setting and dissertation writing, but not versed in the field of adult education. We met several times to verbally share my audit trail and review my process of analysis. Therefore, she could provide an informed, but unbiased, perspective and ask clarifying questions about the study. The process of confirming my knowledge claims with her served to verify them and, consequently, increase the internal validity of the study.

*Thick, rich description.* When writing up my findings, I thoroughly described the participants and discussed the interpretive results in an organized, coherent fashion. Findings were conveyed through rich, thick description that directly responded to the questions in the study. “The purpose of a thick description is that it creates verisimilitude, statements that produce for the readers the feeling that they have experienced, or could experience, the events being described in the study” (Creswell & Miller, 2000, p. 129). Direct quotes from interviews, incidents from field notes, and material from personal documents and interview sessions provided adequate and convincing evidence for readers since my interpretations flowed directly from the data. As suggested by Wolcott, I made a concerted effort to “keep the focus on the descriptive task until you have provided a solid basis for analysis” (2001, p. 75).

#### Writing the Narrative

Writing accurate narrative findings is an emergent and ongoing process, meaning, “the interweaving of data collection and analysis is highly transactional, each activity shedding new light on and enriching the other” (Ely, 1997, p. 165). The critical outcome of this process is to establish congruency between the primary researcher’s findings and his or her knowledge claims. To do that, the data must be made sense of and must be carefully managed, analyzed and, finally, accurately reflected in the findings.

Prior to writing up the data of this study, I created an audit trail. First, I wrote extensive field notes immediately following the interviews and took abbreviated notes during the sessions, doing so inconspicuously so that participants would not feel uncomfortable. In the margins, I made observer comments about my thoughts and hunches or noted any follow-up actions necessary. Later, in addition to the descriptive commentary, I also wrote theoretical memos and procedural memos to clarify and expand my thinking about both theories and methods, respectively, which were central to my study. This attention to detail resulted in an abundance of description to convey the findings.

#### *Criteria of Goodness*

“Phenomenological methods require a commitment to rigor and openness to learning, a respect for those who will participant as your co-investigators and a sense of humility about the whole process” (Merriam, 2002, p. 141). Criteria of goodness and rigor in phenomenological studies can be expressed in trustworthiness, credibility, and authenticity.

#### *Trustworthiness*

Trustworthiness has to do with issues of internal validity, reliability, and external validity or generalizability. “In qualitative research, strategies for ensuring for adequate treatment of each of these issues include triangulation, member checks, peer examination,

investigator position, audit trail, and rich, thick description” (Merriam, 2002, p. 31). Giorgi (2002) suggests there is only one criterion for validity in phenomenology—fidelity to the phenomenon. Merriam (2002) suggests that validity is demonstrated upon use of an audit trail which involves the researcher collecting data in a thorough and authentic manner, using rigorous analysis, explaining alternative competing meanings, and showing the path of knowledge development through concrete steps of data transformation. “If others can see the integrity of the process and the ability to explain competing findings, you have demonstrated validity from a phenomenological perspective” (Merriam, 2002, p. 141).

### *Credibility*

Research conclusions must reflect the complexity of the situation in order to be perceived as credible. If insights are vivid and faithful to the lived experience, as well as self-validated by research participants, then others will likely see the text as a statement of the experience itself. As cited in Dowling (2007), van Manen refers to this as the “phenomenological nod,” “a way of demonstrating that good phenomenological description is something we can nod to, recognizing it as an experience that we had or could have had” (p. 8). The research must be conducted in a manner to ensure the topic was accurately identified and described in-depth (using thick, rich descriptions).

Hall and Stevens (as cited in Laverty, 2003) described adequate credibility as occurring when the whole process of inquiry is reflected, relative to the purposes of the study. This involves the use of reflexivity and the construction of texts that are not only credible to the experience but can be understood by insiders and outsiders alike. Use of a decision trail, which documents rationale, outcome and evaluation of all actions, and

prolonged persistent engagement with the data may facilitate the goal of credibility (Creswell, 1998).

### *Authenticity*

Authenticity in qualitative research is perhaps best sought through utilizing a careful reflective approach which includes clear expression of the researcher's reflexivity and positionality. Merriam suggests that "since phenomenological methodology is an embodied process, the researcher must engage in self-reflection to understand how the process is unfolding" (Merriam, 2002, p. 117). Therefore, the researcher's thoughts, responses, and decision-making process should be acknowledged, explained, and documented throughout the entire research process. This record is a key component of the audit trail.

### *Researcher's Role and Reflexivity*

My role as researcher was to understand what the experience of higher education is like from the perspective of OBB students who are pursuing collegiate degrees. I first sought to understand the words participants express in both interviews and reflective journal writings. I then attempted to interpret meaning from these words. To ensure accuracy in my interpretations, I strived to minimize the distance between me and the participants by attaining an insider status which required spending time with them in the field and thus learning about the context of their social situations. I also shared some background information about myself which enabled me to become more of an insider rather than an outsider. Disclosing such information made the participants feel more at ease in discussing their experiences with me.

Although I was the main instrument of both data collection and analysis, I never entirely shed my outsider status. In order for me to become as freed as possible from my

myopic point of view and to become truly empathetic toward participants' perspectives (without negating my own), I had to become cognizant of my own biases throughout the research process. Only by being mindful of my positionality did I become sensitized to the "otherness" of participants who are situated in realities different than mine.

Regarding my ethnic and educational biases, I am a white female with bachelor and master degrees, making me like many in the Baby Boom generation who are well educated. I have a definite bias toward the value of adult and continuing professional education as evidenced by my own current pursuit of a doctorate degree in Education Leadership. Since I have worked in the area of higher education administration and workforce development for a number of years, I am very interested in the trends of adults pursuing higher education for reasons of personal enrichment, career advancement and career redirection. From personal experience, I can relate to those adults who have struggled with past interruptions in their education and career paths.

Regarding dimensions of spirituality, I greatly value the influence of spirituality in people's lives; I have both studied and taught theology previously. Although I am biased toward my personal practice of Catholicism and formation in Christian spirituality, I have been educated in other faith traditions and nonreligious notions of spirituality. I am very intrigued by recent writings pertaining to the nonreligious spirituality of work and learning and the integration of one's life mission with one's work.

I am familiar with the context of the participants for a number of reasons. First, I am part of the Baby Boom Generation myself, although I was born in the last year of that generation. Second, I am very familiar with the university setting of this study since it is my alma mater and a former employer. Third, I believe I can relate to the study participants

because of my own study and work in adult and continuing education. My familiarity with this institution, my own pursuit of a degree there, as well as my personal value of continuing higher education have allowed me to come from an emic rather than etic perspective.

Although I am a novice researcher, my background in human service and counseling has afforded me an ease in conducting both interviews and focus groups. My experience conducting interviews for hiring purposes is extensive; I have also done investigative interviews for prior graduate courses. Perhaps most importantly, I am generally a good listener and genuinely interested in the stories of adults returning to higher education.

Researcher reflexivity is a critical component of qualitative research. Drew (2001) proposes a method of researcher reflective activity called *synthesis of intentionality*. Through that process, the fullness of phenomenological description comes to fruition by merging the experiences participants and the researcher deem meaningful. Drew contends that the hallmark of phenomenological research lies in “the continuing attempt to identify and explicate one’s unique and particular experience of a phenomenon in order to see how such experience influences the results of one’s research” (p. 19). Similarly, Donalek (2004) states that “good phenomenological research is more than a simple synthesis of the contents of a group of interviews. Research is not truly phenomenological unless the researcher's beliefs are incorporated into the data analysis” (p. 516).

#### *Delimitations*

This study was delimited in a number of ways. First, it was conducted in a single, four-year public university in the Midwest with a small number of participants (less than 10). Participants were older students between the ages of 50–62 who have completed at least 6 credit hours in the Bachelor of General Studies (BGS) degree program. Only those in the



leading edge of the Baby Boom generation were participants since they are closer to retirement than those in the younger half. Participants are adult learners who are seeking formal collegiate degrees, not those participating in informal and nonformal adult education programs. Consequently, these students are engaged in credit bearing courses rather than noncredit offerings. The single type of research design used is phenomenology.

#### *Limitations*

There are several limitations associated with this study. First, use of a purposive sampling procedure and a small number of participants precludes the generalizability of the findings. This study will not be generalizable to all adult students since generalizability is never the goal of qualitative research. Rather, information may be appropriated at an institution in a similar context. Second, since this is a qualitative study with the researcher as the primary instrument, the findings may be subject to other interpretations. Third, this study is limited by the particular students who are currently enrolled in the BGS program and who choose to participate in the study. Fourth, only one person of color participated in this study, a limitation of the study indeed. Finally, when examining students' spiritual development, it is important to note that all participants were raised within Christian religious traditions. Hence, other, non-Christian religious belief systems were not represented in this study.

#### *Pilot Study*

Prior to the start of data collection, a pilot study was conducted. Interview and reflective journal questions were tested with four individuals who are adult learners seeking collegiate degrees. While all of these individuals were at or near the criteria age used in the study, they were not enrolled in the BGS degree program at the study site. The primary purpose of the pilot study was to clarify any particular interview questions which may have

been ambiguous. The feedback from pilot participants was helpful in rewording some questions and eliminating others which may be redundant or irrelevant. Using a pilot study was critical to the success of the research process.

### Summary

Chapter 3 describes the qualitative research design and methodology that was used in this phenomenological research process. This study examined the experience of degree-seeking OBB to see how various dimensions of adult development influence their career and retirement aspirations and their learning experience within the context of higher education. Specifically, this study explored: (a) why these students seek higher education degrees, (b) the ways they construct knowledge and meaning from this experience (cognitively, psychosocially, and spiritually), and (c) the expectations they have of the role of higher education in supporting their continued development and life transitions.

The research site, participants, and data collection methods were described. Data analysis techniques were explained, and the elements of goodness were outlined. The delimitations and limitations of the study were followed by a section about the researcher's role and reflexivity which explains her qualifications as well as her beliefs that were brought into the research process. Finally, a pilot study was described which served as a precursor to this study.

### Transition

In accordance with the alternate dissertation format, the following chapters feature three articles submitted to scholarly journals for publication. Each journal article centers on an overarching research question relevant to the original proposed study—a phenomenological study that examined the experiences of degree-seeking OBB learners to

understand how psychosocial, cognitive, and spiritual dimensions of adult development influenced both their transformative learning experiences in higher education and their future vocational aspirations.

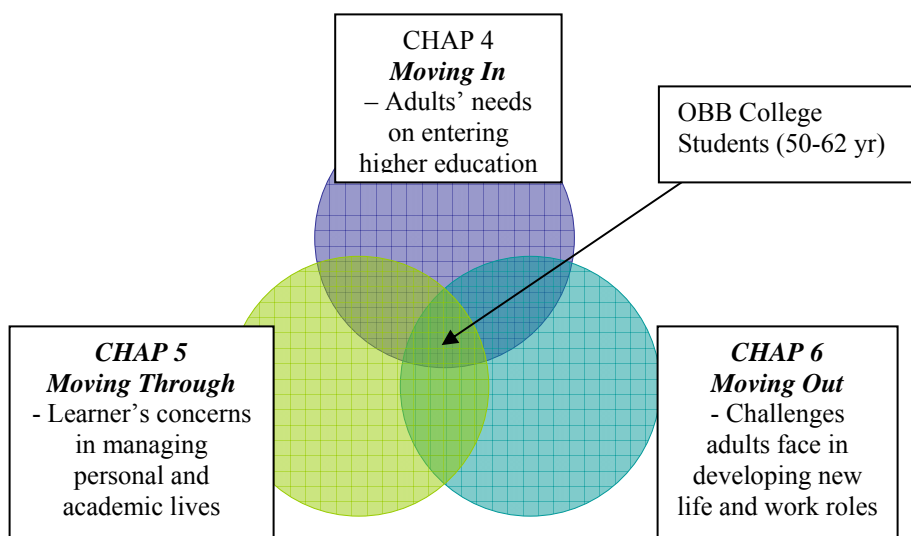


Figure 3.1. Diagram of Findings Chapters

Each chapter of findings is framed within one portion of Nancy Schlossberg's transition model—moving in, moving through, and moving out from college, as depicted in Figure 3.1. While Schlossberg provides an understanding of adult psychosocial development, Jack Mezirow's transformational learning theory provides a framework for understanding adult learning and development. Adult spiritual development is examined within the context of the spiritual quest construct.

Several themes for each article were inductively identified, proving a rich understanding of the phenomena of OBB students' degree-seeking experience. General

research themes which emerged from the study included, but were not limited to, the following: adult learner characteristics and reasons for enrollment; higher education support needs; adult transformative learning; self-identified cognitive, psychosocial, and spiritual development; vocational concerns of meaning, purpose, and service; and spiritual influences on future aspirations.

In essence, the fundamental structure of the phenomenon of pursuing higher education degrees, as perceived by these OBB participants, was found to be a self-identified transformative process resulting in improved learner self-efficacy, and acquired within a supportive, adult-friendly higher education environment which enabled students to successfully transition not only toward degree completion and ensuing career enhancements, but toward meaningful vocational aspirations grounded in personal spiritual beliefs.

This complex statement describes the phenomena of OBB seeking higher education degrees and engenders possibilities too numerous to explore in a single study. Therefore, the first article addresses the student experience of OBB transitioning back into college. The second article examines the learning experience (and consequential transformation) of OBB students as they move through college. The third article explores OBB students' future aspirations beyond college, including the impact of spirituality on their vocational and retirement plans. The final chapter is a summary of the dissertation which includes implications and recommendations for further study.

## CHAPTER 4. VOICES OF OLDER BABY BOOMER STUDENTS: SUPPORTING THEIR TRANSITION BACK INTO COLLEGE

By Jane L. Schaefer

A paper submitted to *Educational Gerontology: an International Journal*

### Abstract

Increasingly, older adult students are seeking higher education degrees. Their success depends, in part, upon fulfillment of critical support needs. This phenomenological study explores the experiences of nine contemporary Older Baby Boomer students (ages 50–62) who are pursuing bachelor's degrees at a Midwestern university. This article highlights findings from the examination of qualitative interviews and reflection questionnaires completed by these participants. Schlossberg's transition model provides a theoretical framework for the findings which suggest that most of these learners: (a) are first generational college students who need a better understanding of the formal higher education process; (b) are primarily motivated by career aspirations, rather than personal enrichment; and, (c) experience complex support needs while transitioning back into their college endeavors. Program and policy implications relevant to creating adult-friendly higher education environments are suggested.

### Introduction

Baby Boomers represent 26.75% of the United States population (MetLife's Mature Market Institute, 2005). The upper edge of the Baby Boom generation, termed *Older Baby Boomers* (OBB) by this author, includes 32 million adults. By 2030, according to the University Continuing Education Association (2002, April), the population of those over 60 years old in the United States is expected to grow from 45 million in 2000 to more than 91

million. These numerical projections have staggering implications for all providers of adult services, including those in higher education.

Adults are going to school in record numbers for additional education and training (Creighton & Hudson, 2002; Kim, Collins-Hagedorn, Williamson, & Chapman, 2004). The increasing proportion of adult learners makes their pursuit of higher education degrees a significant issue to research. Adult learners are an underserved student population in that they negotiate a system of higher education that is geared toward traditional aged students (Hagedorn, 2005; Pascarella & Terenzini, 1998; Pusser, Breneman, Gansneder, Kohl, Levin, Milam et al., 2007; Rendón, 2006). “Although institutions are becoming sensitive to the challenges adult learners face, institutional actions and strategies are neither generally systematic nor empirically based” (Pusser et al., 2007, p. 7). This study identifies appropriate actions and strategies of institutional support for older adult learners. By examining what is personally meaningful to OBB students (ages 50–62), findings afford greater clarity to those most concerned with providing effective lifelong learning opportunities—namely, adult educators, adult education administrators, policy-makers, and employers. Specifically, this study provides an understanding of why OBB students are seeking higher education degrees and what types of support they need during their college reentrance process.

The study is timely due to the convergence of several national trends impacting adult education today. First, the increase in the older adult population’s size and proportion yields a corresponding burgeoning adult student population. Over the past three decades, the number of adult students has increased steadily (by 144%), whereas, the number of students under age 25 increased by only 45% (Anderson, 2003; Creighton & Hudson, 2002). This

trend holds true at degree-granting institutions where the enrollment of adult learners grew 286% between 1970 and 2005 and is projected to grow another 20% by 2016 (National Center for Educational Statistics [NCES], 2008).

Second, the demographic phenomenon of increasing adult learners has an impact on the societal issues of workforce and economic development in the 21<sup>st</sup> century. Regarding adults' return to college, "the knowledge economy and global industrial production have necessitated postsecondary education—individually and nationally" (Pusser et al., 2007, p. 1). Employers in many industries are experiencing an urgent workforce shortage in both the number and skill level of employees (Schultz, 2001; Stein, 2000). This reality is driving people to delay full-time retirement. In fact, between 2000 and 2015, "the highest growth rate in the U.S. workforce will be among workers aged 55 to 64" (Montenegro, Fisher, & Remez, 2002, p. 5). Since nearly four out of five Baby Boomers desire to continue working beyond typical retirement age, many will require upgraded skills and credentials (Freedman, 2005b).

A third trend impacting adult education is the elongated lifespan in the United States—age 77 today compared to 47 in 1900 (Zeiss, 2006). This reality provides an impetus for a new stage of adult development whereby some may "have already retired, but are still seeking purpose and productivity" (Freedman 2005a). In essence a new state of adult life has been created—a "second middle age"—between the ages of 50 and 75, between the traditional "middle age" and "old age" (Lifelong Learning for an Aging Society, 1992). Longer life expectancy and longer life after retirement have influenced older adults to participate in various emerging and expanding activities, especially those that involve new experiences, contributions to society, and learning (Fischer, Blazey, & Lipman, 1992;

Peterson & Masunaga, 1998).

The increasing demand made on higher education by adults is accentuated by the expansive Baby Boom generation (77 million), the first cohort of which turns 65 in 2011. Baby Boomers are returning to college for both employment and personal reasons (Creighton & Hudson, 2002). Both well educated and undereducated members of this generation will demand access to the higher education system in the United States. On the one hand, never before has a generation been this well educated on average. Nearly 89% of the Baby Boomers have high school degrees, and 28.5% have a bachelor's degree or more (MetLife, 2005). Since prior educational attainment is positively associated with participation in adult educational activities (Kim et al., 2004), those from the Baby Boom generation who have experienced prior college education will expect educational services that are intellectually rewarding and meaningful.

On the other hand, despite the fact that in the United States postsecondary education has long driven individual social mobility, “the nation’s labor force includes 54 million adults who lack a college degree; of those, nearly 34 million have no college experience at all” (Pusser et al., 2007). “In the U.S., more than 59 million people, or 30 percent of the adult population, are untouched by postsecondary education—and in 35 states, more than 60 percent of the population does not have an associate’s degree or higher” (Council for Adult and Experiential Learning [CAEL], 2008, p. 6). Therefore, those without college education are also in need of educational opportunities for workforce skill development and career enhancement opportunities. Adult learners at both ends of the educational continuum will demand social and education policy changes to make higher education more assessable (Bailey & Mingle, 2003).



### Background of Study

The dominant paradigm of studying adult higher education aspirations has been quantitative in nature. This study addresses qualitative research gaps in the higher education literature pertaining to older adult, degree-seeking students, particularly since the majority of studies concerning this population have focused on those seeking noncredit and informal education, rather than for-credit, formal education.

This study was one portion of a larger phenomenological study that examined the experiences of degree-seeking OBB students to understand how psychosocial, cognitive, and spiritual dimensions of adult development influenced both their transformative learning experiences in higher education and their future vocational aspirations. The research themes which emerged from the larger study included, but were not limited to, the following: adult learner characteristics and reasons for enrollment; higher education support needs; adult transformative learning; self-identified cognitive, psychosocial, and spiritual development; vocational concerns of meaning, purpose, and service; and spiritual influences on future aspirations.

The fundamental structure of the phenomenon of pursuing higher education degrees, as perceived by these OBB participants, was a self-identified transformative process resulting in improved learner self-efficacy and acquired in a supportive, adult-friendly higher education environment, which enabled students to successfully transition not only toward degree completion and ensuing career enhancements, but toward meaningful vocational aspirations grounded in personal spiritual beliefs. This statement describes the phenomena of OBB seeking higher education degrees and engenders possibilities too numerous to explore in a single study.

Thus, the primary objective of the study reported in this article was to explore who contemporary OBB students are, what past experiences and future aspirations bring OBB students (ages 50–62) to higher education, and what support needs they experience while moving into the degree completion process. Key focal points for this study were past educational experiences and family influences that brought OBB students into higher education, reasons they were pursuing collegiate degrees, and types of support they received and needed to successfully navigate their transition back into college.

#### Research Design and Analysis

Located in the constructivist epistemology and using an interpretive theoretical perspective, the study presumed that knowledge is socially constructed, truth is relative, and meaning emerges inductively. What is real and meaningful is a construction in the minds of individuals, not an objective truth out there merely waiting to be discovered. “In this view of things, subject and object emerge as partners in the generation of meaning” (Crotty, 2003, p. 9).

This study utilized a naturalistic qualitative inquiry process, drawing upon the tradition of phenomenology. In phenomenology, the focus is on the essence of meaning that individuals construct about particular phenomena or experiences, within the constraints of culture (Bogdan & Biklen, 2003; Creswell, 2003; Merriam, 2002). As typical in an interpretive research process, in-depth narrative information was attained through semi-structured participant interviews and document analysis (Creswell, 2003; Seidman, 1998). Primary data collection methods consisted of: (a) two 90-minute semi-structured individual interviews; (b) one 30-minute phone contact (which served as a third interview). All interviews were audio taped and transcribed verbatim. Secondary data collection

consisted of (a) one reflection questionnaire completed by nine individual interview participants, and (b) an archival data review of the degree requirements of the program in which students were enrolled.

As typical of the primary sampling technique used for qualitative research (Patton, 1990), a purposeful sampling strategy was used to select information-rich cases of participants between the ages of 50 and 62 who were currently enrolled (or had recently graduated) in the Bachelor of General Studies (BGS) degree program at a Midwestern university. Ten volunteer participants were recruited through letters, although one ceased participation prematurely due to her husband's death. Findings in this article reflect data from nine individual interview study participants whose composite profile can be found in Table 4.1.

Data were systematically analyzed by first listening to each interview and reading all transcripts to get a general sense of the data. This holistic review of data was followed by a more focused, three step examination process. First, the data were dissected into the smallest units of meaning in order to discover any significant statements of reality from the participants' perspectives. Then, data were pieced back together inductively in new ways to produce meaningful interpretations of participant statements. Finally, themes of meanings emerged from the data analyses, and an exhaustive description of the phenomenon was created (Bogdan & Biklen, 2003; Creswell, 2003; Esterberg, 2001). From the interviews and journal entries, persistent patterns were inducted from the data regarding OBB students' transition into the higher education process.

The final step of data analyses, validating the findings, was critical to the trustworthiness of this study. Multiple strategies were utilized to verify conclusions,

including triangulation of data, presenting negative or discrepant information, retaining access to participants for continued member-checking, and utilizing both a peer reviewer (a seasoned academic advisor in the BGS program) and an external auditor to develop “intersubjective consensus” (Creswell, 2003; Miles & Huberman, 1984). Finally, relevant literature was examined to determine if the thematic trends and patterns found in the data were supported throughout the breath of literature.

### Theoretical Framework

Nancy Schlossberg’s transition model offers a conceptualization of the transition process and provides a theoretical framework in which to examine the experience of OBB students transitioning back into college. “The transition framework is designed to depict the extraordinarily complex reality that accompanies and defines the human capacity to cope with change” (Schlossberg, Waters, & Goodman, 2006, p. 55). Central to the model are four factors that influence a person’s ability to successfully cope with change: situation, self, support, and strategies.

Schlossberg defines transition as “a process over time that includes phases of assimilation and continuous appraisal as people move in, through, and out of it” (Schlossberg et al., p. 53). The process of these life transitions fosters learning and development. Schlossberg (as cited in Evans et al., 1998) writes, “A transition can be said to occur if an event or non-event results in changed assumptions about oneself and the world and thus requires a corresponding change in one’s behavior and relationships” (p. 111).

Since OBB students in this study entered the BGS program with prior college experience and were, in essence, “moving in” again to complete prior education goals, the “moving in” portion of Schlossberg’s transition model is most relevant. Furthermore, two of

Table 4.1

*Composite Profile—Individual Interviewees*

Female Participants				Male Participants			
Name <sup>1</sup> Birth Year	Work	Family	School	Name <sup>1</sup> Birth Year	Work	Family	School
Marge 1948 (60 yr)	PTE work administrative support for healthcare	Married 3 adult children	Sociology, Theater and Journalism  PTE student	Leonard <sup>3,4</sup> 1950 (58 yr)	FTE work manager for transportation company	Married 3 adult children	Psychology  PTE Student
Alice 1953 (54 yr)	FTE work project coordinator - healthcare	Married 2 adult children; 1 grand child	English  PTE student	Bill <sup>4</sup> 1954 (54 yr)	FTE work technical engineer for agricultural company	Married 6 children 4 K-12 (home schools) 1 BSN; 1 some	General Administration  PTE student (on- line only)
Kate 1957 (51 yr)	FTE work insurance industry for State of NE	Single No Children	Business and Journalism  PTE student	Neal <sup>4</sup> 1957 (51 yr)	Unemployed  Recent BGS grad	Married 1 adult child	Counseling (seeking MA)  FTE student
Rita 1958 (50 yr)	FTE work data associate for healthcare	Divorced 1 adult; 1 special needs; 4 grand children	General Administration PTE student (on- line only)	Bobby 1957 (51 yr)	FTE work computer programmer for investment firm	Married No children	Management Information Systems  PTE student
Janelle <sup>2</sup> 1946 (62 yr)	FTE work project coordinator for human services	Married 2 Adult children; several grandchildren	Business, Public Administration, History, and Psychology PTE student	Paul <sup>3,4</sup> 1955 (53 yr)	PTE work personal trainer	Married 2 children - 1 in college; 1 in HS	Recent BGS grad - History  FTE student

<sup>1</sup>Pseudonyms were used to protect student identities<sup>2</sup>Withdrew from study due to husband's terminal illness<sup>3</sup>Retired Military<sup>4</sup>Graduate School Aspirations

Schlossberg's four s's, namely situation and support, are most relevant to the findings and are reflected in the research questions explored. To understand this phenomenon, it is helpful to know the situations surrounding students' current enrollment experience including the: (a) influences of past education experience and family upbringing, (b) reasons they pursued degrees, and (c) types of support needed to successfully navigate through the higher education process.

### Findings

Data suggest that most of these learners: (a) are first generational college students who need a better understanding of the formal higher education process; (b) are primarily motivated by career aspirations, not personal enrichment; and, (c) experience complex support needs while transitioning into college.

#### *Older Baby Boomer Students are First Generation College Students*

When examining the influences of past educational experiences and family of origin on OBB participants' transition into the BGS program, the most telling finding is that most of the participants were first generation college students. Even though many of their children had college experience, only three of 18 of their parents had any direct postsecondary experience, as indicated in Table 4.2. Bill captured this reality when he said,

*I had to look at the fact that my parents never graduated from high school, let alone college. So for me it was just like whether you're a minority or something else, I look back now; it was a lack of information.*

“Past studies have well demonstrated that first-generation college students—students who do not have a parent who went to college—often encounter major hurdles in the college process” (Lee, Sax, Kim, & Hagedorn, 2004, p. 1). Consequently, first-generation students can experience personal doubts regarding their academic and motivational ability. In this

study, the economic and social benefits of a postsecondary education are not something directly experienced by most parents of OBB students.

Table 4.2

*Education Levels of Family Members*

	Father	Mother	College Emphasized	Siblings' Attendance	Children's Attendance	Spouses' Attendance
Marge	Bachelors (two degrees)	HS diploma	Yes	1 Bachelors; 1 Associates; 2 Some; 2 None	3 Bachelors	No College
Paul	5 <sup>th</sup>	HS diploma	No	2 Bachelors; 3 Some; 1 HS only	1 Some college; 1 in HS	Masters
Rita	3 <sup>rd</sup>	6 <sup>th</sup>	Yes (father) No (mother)	2 Bachelors 1 seeking MA, 1 Some college	1 Some College (1 in grade school)	N/A
Bobby	HS diploma	BSN	No	1 seeking MA 1 HS only	N/A	No College
Neal	HS diploma	HS diploma	No	1 Bachelors 1 Some	1 HS	Bachelors
Kate	HS diploma	HS diploma	No	1 Bachelors 1 HS only	N/A	N/A
Bill	8 <sup>th</sup>	9 <sup>th</sup>	No	1 HS only	2 some college; 4 in K-12	Some college
Leonard	HS diploma	6 <sup>th</sup>	No	3 HS only 1 Some	1 PhD; 1 Bachelors; 1 HS	Bachelors
Alice	HS diploma	Some college	No	4 Bachelors	1 Bachelors; 1 some college	Some college

*Prior Educational Influences*

Most OBB were raised by parents who had lived through the Great Depression and expected their children to apply a strong work ethic to their K–12 education endeavors. Neal describes, “*We were expected to do well in school and to give it our best.*” Despite this

common early message about the importance of K–12 education, only a few of the study participants did well academically, taking a rigorous course schedule in high school. While all graduated from high school, eight of nine participants mentioned having a negative K–12 experience due to social isolation, poor academic performance, or underachievement. Paul, for example, said, *“When I went to high school I didn’t do so well. I had the, I had the ability to do well, I didn’t have the motivation to do that well.”*

While participants’ parents espoused a value of K–12 education, college attendance was not expected and was considered a luxury that several could not easily afford. As Kate said, *“You know when I was growing up, my parents—they didn’t think a college education was really necessary. They said if you wanna go, you have to pay for it.”* Paul remembered, *“For whatever reason, it [college] just wasn’t pushed. I think that wasn’t his [father’s] experience to have an education.”* Another student said, *“My parents, they felt if we got a high school diploma that was fine.”*

### *Prior Career Influences*

For many participants, working in the trades, rather than pursuing an education in the professions, was emphasized in their upbringing. Alice remembered, *“My parents didn’t encourage me to go to college. They encouraged me to get a trade.”* Likewise, Leonard said,

*Where I grew up, college wasn’t a big thing. We’re a factory industrial town. There were more skilled people there than there were educated people. So it wasn’t really a thing that that even entered my mind back then. I didn’t want to go to college after the 12th grade.*

Several participants’ parents who did labor work encouraged them not to do it. They wanted something better for their kids. Neal remembers, *“My dad drove a truck around town here and delivered freight. He didn’t want to. If you didn’t have to be a laborer then that was*



*good, cuz he knew what that life was like.” Leonard said, “They didn't want you to go to the factory and work because that was always the bad thing. They always wanted you to have a trade, so I was pushed to learn cement and those things.”*

Several participants mentioned being discouraged by high school guidance counselors to pursue a college path and, instead, were influenced toward the trades. Bill said,

*If I look back in retrospect, one area that would have helped me is general information. Counselors in high school—and I'm not knocking them but let's face it, I wanted something more like engineering, and they kind of discouraged me almost [toward the trades].*

Other participants' personal experience of doing manual labor after high school was a key motivator toward their pursuit of higher education as an adult. Bobby, for example, said, “*I guess it just felt better enrolling in school, just gave me some hope of a better life. I was really pretty much alone and just doing menial work, factory work and it wasn't stimulating.*”

#### *Entering the BGS Program*

One's college entrance transition is greatly impacted by the unique situations surrounding it (Schlossberg et al., 2006). Key events triggering a return to school were identified for each participant: (a) Marge and Alice returned due to an empty nest and desire for personal fulfillment; (b) Neal, Bobby, Bill, Rita, and Kate had experienced job loss and/or promotion difficulties; and (c) Leonard and Paul experienced recent or anticipated retirement.

Several participants acknowledged that the timing was right for enrolling as an older adult student and that degree completion was simply overdue. Neal expressed a common

sense of urgency that the time for degree completion was running out, *“I’m getting older and if I’m gonna do this, I need to do this in a hurry and get it done so that I can get back out in the working environment.”* Alice, who had delayed enrollment until her children were out of high school, said, *“I really believed it was just the right time for me to go back to school.”* Marge too had an empty nest and saw completing the degree as a way to avoid social isolation. She said,

*I think I went through a big, serious empty nest problem there. It was just this loss—what do I do now? The being isolated, children were gone, and what am I here on the earth for, what is my purpose anymore?*

Other advantageous factors which influenced OBB participants to enroll in the BGS program were reflective of national trends, including convenience, flexible pacing, ability to transfer credits, and low costs (Noel-Levitz & CAEL, 2005, p. 7).

Many viewed the pursuit of their BGS degree as an important personal investment. Bobby said, *“I’ve got enough wrapped in it, time, energy, money, whatever, that it would just feel like I was running those off if I quit now.”* Paul was simply determined to finish a previously set goal, *“My motivation, was to finish what I started. It’s kinda like okay, take out the trash, mow the lawn, finish degree. It was on my to-do list.”*

#### *Knowledge of Higher Education Processes*

Unlike their parents, OBB students in this study were not strangers to higher education. All began the BGS program with prior college credits, and most had made several attempts to attend over the years. Despite this previous college experience, one of their greatest difficulties upon entering the BGS program seemed to be a lack of knowledge (or misinformation) about higher education processes. Neal said,

*First starting, this was walking through a whole new door I hadn’t been*

*through in years, and things had changed considerably. There was a lot of confusion of what I needed to do to start, the fear of getting started.*

Confusion about higher education processes ranged from simple to complex tasks.

Many lacked an understanding of basic logistics—such as how to register using a web-based system, how to access college resources such as the library, the bookstore, and parking—to more complicated issues such as how articulation works. Students were unaware of increased math requirements (compared to those in place during their original attempts at college), alternative course delivery options such as on-line and team-taught courses, and new course requirements, such as multiculturalism.

Many did not seem to understand how course requirements work. For example, Rita did not know the difference between upper and lower level course requirements as evidenced in her comment, *“Some of the students are freshmen. And yet this was a junior class and I thought, wait a minute. They allow a freshman to take a junior class, but they didn’t allow a junior to take a freshman class?”*

Several participants did not understand the difference between “regular” degree requirements, such as a bachelor’s degree in psychology, and the adult-focused Bachelors in General Studies degree. Leonard said, *“I’m not sure if, since my concentration is gonna be in psychology, how a psych major would actually accept that. Are you really a psych major or are you just someone taking continuing studies with an emphasis in psych?”* Bill, too, was confused about what degree he was actually getting,

*Well see my confusion is, a lot of times at work they’ll ask me what degree am I going for? Bachelor of General Studies or Bachelor of General Administration? Is administration a kind of interest within general studies? I’m trying to understand what I’m going for.*

Some students had a literal belief that on-line courses did not fulfill the residency

requirement because they were not delivered on-campus. Kate claimed,

*The advisor told me, I think, at least sixty percent of our classes have to be on campus. You can take some online courses but I cannot take all of them online. I have to be on-site at some point.*

Others had to take additional courses because they were unaware of changed requirements and curriculum. “*I didn't realize that when you go back to school, you have to follow the current curriculum, not the curriculum you left.*” There seems to be a strong need for more advanced planning and course sequencing. Bobby, one discouraged by the amount of course work remaining and stamina needed yet to finish, said, “*Maybe I should have planned a long-term schedule sooner.*”

Students interested in pursuing graduate studies needed further guidance about how that process works. Neal, who had completed his BGS degree just prior to the commencement of this study and was beginning a masters degree, stated, “*Going from undergrad to grad work . . . there were tests to be taken, interviews, evaluation of your progress, grades and that kind of stuff.*”

#### *Higher Education Goals of OBB Students Are Primarily Career-Related*

Upon examining the precipitating events triggering a return to college, it is important to note that most were career-related, such as employment layoffs, work boredom, recent or anticipated retirement, and lack of promotion due to non-degreed status. Even those participants most interested in lifelong learning and personal enrichment desired some type of career change—to move beyond the status quo—via either advancement or doing a different kind of work altogether. This finding has great significance for understanding the life and career planning needs of OBB learners. Nationally, there is a discrepancy between

adult learners' desire for career services and those they actually receive (Noel-Levitz & CAEL, 2005).

The primary reasons OBB participants were pursuing college degrees are summarized in Table 4.3. OBB students are keenly aware that degree attainment is key to achieving future career ambitions. Bobby stated,

*I have been programming for probably 15 years now and got laid off from my job and realized that I probably needed to do more to be competitive in the job market than what I was doing, so getting my bachelor's degree seemed like an option.*

Some participants were happy at their current jobs but cognizant of needing the degree to secure career advancement opportunities and greater income potential. Kate said, *“If I had wanted to get promoted in the department, I was going to have to have that paper.”* Bobby said, *“I’m pretty stable where I’m at and pretty happy where I’m at. I would like to make more money and [getting a degree] is probably the only thing I think, that would make a difference.”* According to Bill, *“I really hope it’ll help open up more doors for my employment at work which I’ve been told it will.”*

Table 4.3

*Primary Reasons for Degree Completion*

	Number	Percentage	Average Age
Career Advancement	4	44.4%	51.5
Career Change	3	33.3%	54.0
LLL/Personal Enrichment Goal	2	22.2 %	57.0

Notes of Interest:

Two OBB students are already retired from military (55.5 avg. age).

Four OBB students have graduate school aspirations (54.0 avg. age).

Others were discontent and bored with their current work experience and looked to degree completion to add more intellectual stimulation than their current jobs provided. Neal said, *“It was becoming too routine—there was no challenge . . . It just got to be rote. You could do everything with your eyes closed. I was making great money at it, but I was bored crazy.”* A few were seeking a career change due to recent or anticipated retirement. Leonard, wanting to begin a third career in addictions counseling, said, *“I know to do what I want to do, I need a piece of paper. That's my driving factor.”*

Although the majority of participants in this study were seeking college degrees for career-related reasons, two OBB students considered lifelong learning and personal enrichment to be their primary motivation for returning to college. For Alice, a self-described lifelong learner, completing her degree was important to her personal enrichment, *“I was the only one of my siblings that didn't have a college education, but I felt like I could hold my own with them but I always had this thing of I was missing something.”* Marge said, *“It's like, a lifelong dream, very challenging, very hard, but I'll be able to look back on it and have that little diploma hanging up on the wall somewhere.”* It is interesting to note that those who were more motivated by personal enrichment goals were older on average than those who were seeking career advancement or new careers altogether.

#### *OBB Students Have Complex Support Needs*

As OBB students transition from work back into school to new work to retirement, this process can create a large amount of stress. Consequently, OBB students have complex support needs. *“An individual's ability to cope with transitions depends on the changing interaction and balance of his or her assets and liabilities”* (Schlossberg et al., 2006, p. 82). For example, supportive relationships are considered assets while lack of support is a

liability. Ideally, higher education environments provide more assets than liabilities. In this study, participants' experience of a supportive environment was critical to their successful transition back into college.

#### *Meeting Complex Needs—Functions of Support*

Degree completion can be hampered by the difficulties that adult students experience during the transitions they must navigate. For example, all female participants with children delayed their return to college to accommodate needs of their children. Likewise, all male participants with children cited lack of work-school-family balance as reason for stepping out or delaying return. All participants mentioned a need to restrict family socialization or to limit time for personal relationships to meet school demands. Some of the participants also had situations where they had to delay returning to school while their spouse attended.

A majority of the participants mentioned having concerns about financing their higher education. Financial concerns of student participants mirrored national trends. Nationally, according to the 2008 Noel-Levitz National Research Study, entitled *Attitudes of Incoming Adult Learners Report*, 45% percent of incoming adult learners indicated they had financial problems that were “very distracting and troublesome,” and another 25% believed that the pressure to earn extra money will probably interfere with their studies (2008, p. 5). These difficulties represent a few of the complex support needs of OBB students.

In 1980, Kahn and Antonucci (as cited in Schlossberg et al., 2006) identified three primary functions of support for those in transition: affect, affirmation, and aid. First, *affect* refers to expressions of liking, admiration, respect, or love. Second, *affirmation* pertains to the expressions of agreement or acknowledgement received from others, or even oneself. Finally, *aid* is assistance in the form of things, such as money, time and entitlements. This

study examined the types of support received by and needed for OBB pursuing BGS degrees.

*Affect—Supported by Admiration, Respect, or Love*

Every participant in this study indicated that family members—spouses and/or children—were their most important source of supportive admiration. Paul said,

*The support I really needed was my family, you know, and that's, that was there a hundred and fifty percent. I didn't really need any support [from the university]. The only thing I used there, I went to class, I used the library, and I talked to my advisor. That was about it.*

Family members often served as education mentors, encouraging OBB students to start and/or finish school. The majority of those identified as education mentors were immediate family members, including children of OBB students. Leonard said, *“It may have even been my son who inspired me to go back since it's—I'm really going down the same field that he's in.”* Alice was encouraged by her daughter who had already graduated from college, *“I went back to school because of the challenge my daughter gave me [to practice what I preached about getting an education].”* For Kate, her sister was influential, *“My sister, she went back to college when she was an adult and got her degree.”* One participant said, regarding her young adult children, *“I think they're actually impressed that I try so hard because, you know, they went to college and they all did all right, but they didn't study like I study.”*

In this study, spousal support, often reflected in changed roles at home, was critical to mitigating the stress of returning to school. According to Schlossberg, the more a person's life (and roles) has changed—whether for good or bad—the more the person will have to cope (1990). Neal, for example, made the transition from full-time employee and primary



bread-winner to full-time student with no current employment. He said, *“I guess on the positive, I’ve picked up a lot of chores around the house. The negative was that our life styles have changed because of it, financially.”* Yet, his wife’s support of his educational decisions lessened the stress of the transition, *“My wife was behind me 100 percent.”*

Marge, on the other hand, had very little role change, but experienced a great deal of stress since her spouse did not support her decision to pursue her degree.

*I felt so isolated. I think that's primarily what it was. I felt so isolated at home day in, day out taking care of children, taking care of the home, and not getting out in the real world because, you know, he wouldn't let me work either outside of the home. He complained about me being gone, out of the house, but it was only like one or two nights a week for just maybe three hours. And he didn't have to do anything at home, you know. I still made sure everything was done at home.*

Leonard’s spousal support was also limited, *“[When] my wife got her bachelor's, I remember it was ‘Don’t talk to me, I’m trying to do a paper.’ I’m not always afforded that same opportunity.”* Rita, long divorced and new in town, lamented, *“I don’t have anyone to discuss things with, so I have to think them through in my mind. I don’t have a spouse, I don’t have a mate, I don’t have a friend.”*

Somewhat surprisingly, a secondary source of affective support for OBB students was traditional age students. Initially, many participants feared returning to college, in part, because they felt they may not fit in. Neal describes the sentiment, *“There was some apprehension of being accepting in the classroom, you know, looking like some big old jerk in with all these kids.”* Bobby said, *“I thought, you know, I’m just like the biggest misfit in the world because you know, I work in this factory, and I wanna go to school now.”* Marge remembered, *“I really thought it was too late for me. The very first time I took a class I thought, I don’t know if I’m gonna fit in, I don’t know if I can keep up with everybody.”* Paul

said, *“It’s a strange feeling, when you’re pushing 50 in class—it’d be different if it was a masters program—but I’m still trying to pound away at my bachelors and the average age in there is like twenty-something.”*

Yet, most OBB students came to feel solidarity with traditional age students who seemed to like them and showed them respect. For example, Marge, who is 60 years old, described taking a ballet class with all traditional age students, *“I even cried to some of the other students. I said, ‘Well I know I’m gonna fail in this class.’ They go, ‘No, you can’t fail it.’”* Marge also said, *“These young students—I just kinda joke about it to ‘em you know, I just hope I graduate before I die. And they’re all like, oh, I think that’s so wonderful.”*

Bobby remembered, *“I had a speech class and I pretty much enjoyed it, because I really liked the kids. There was some connection. I thought that was pretty cool.”* Alice noticed, *“Some [traditional students] actually like having a nontraditional student in a study group. I think that is because they know we will read the material, do the assignments, and if we commit to something we follow through.”* Neal said, *“I always seemed to be the one picked to take the end of course assessments. I was the trusted one.”* Interestingly, Kate, who spoke most negatively about traditional age students, is not a parent and described herself as *“definitely on the outside looking in.”*

#### *Affirmation—Support from Other’s Agreement or Acknowledgement*

A significant source of affirmation for OBB students were faculty members who acknowledged their assistance needs while transitioning back into college. Neal recalled,

*I think a lot of the instructors, having fifty-year-old students coming back, they would say, you know, are you getting this? Any questions? Trying to get me back into the, the swing of things, to reintroduce me to college level courses. That was helpful.*

Marge said, *“I don’t think I’ve had one professor that hasn’t, you know, [said], ‘Okay, you got a problem, I’ll talk to you about it, I’ll help you’.”* Leonard said, *“All my experiences have been very positive. The professors are willing to bend if you have to take time for work.”*

OBB students were also affirmed by a sense that faculty members appreciated the presence of adult learners in their classrooms. Bobby remembers, *“Some of them, I’m older than them so they just respect me.”* Neal said,

*I think it’s important they get to know me so that when I’m in class and say something that they’re not used to from the general population of students, then they’ll understand. You know, this guy’s not just nuts, he has personal experience. He’s had experiences and life histories that the rest of the student body doesn’t.*

Some participants even viewed faculty as a key source of moral support and friendship. Rita said, *“The instructor puts positive notations in the e-mail messages.”* Neal said, *“There are instructors here that I would consider friends as opposed to just instructors because of taking that time to go find out about something discussed in class or just to have general conversations.”* For Marge, *“The most meaningful experience [in college] was just making friends with professors and fellow students.”* Positive, supportive relationships with faculty and traditional age students mirror adult learner experiences in intergenerational community college classrooms (Kasworm, 2005).

#### *Aid—Assistance in the Form of Things*

Advisors play, perhaps, the most critical support role in offering consistent aid and assistance to OBB students. Neal recognized this early on in the BGS program,

*I got a hold of an advisor here and sat down with him and he said, ‘Do this,’ and I did that. Until I got comfortable on my feet and knowing what was*

*going on and how to get through the college maze, I did what he told me to do.*

Most participants agreed with Marge, *“I feel very comfortable talking to them. They’ve been very helpful.”* The ability to communicate directly via phone or email was very popular with OBB students. Kate said, *“I did have some questions at the very beginning but my advisor, I e-mailed her, and she gives me an answer right back.”*

It is important for advisors to recognize the motivations of adult learners and respect their sense of urgency about degree completion—in Leonard’s words, *“Being aware that the needs of the adult student are different than the typical undergraduate student.”* One participant discussed having to change to a more supportive advisor,

*I don’t know if she was as motivated as the second advisor. As far as, well if she’d worked with, with students like myself that had half their college careers still or credits to get accomplished and wanted to do them as quickly as possible—or if [she thought] most adult students are just picking up classes here and there, on a, on their journey. I didn’t get the vigor from her that I got from the second advisor.*

As alluded to earlier, OBB students are typically first generational students and have a need for accurate information about how the higher education process works. Advisors are instrumental in providing such information, thereby helping OBB students overcome their common fear of failure. Referral to career services and academic support services such as tutoring could also help OBB students feel less isolated. Similar findings about adult learners’ information deficit and the importance of career planning were found for those enrolled in community colleges. Based upon the Emerging Pathways project’s surveys of more than 1,500 adult community college students, “Few factors influence adult learners’ success more than student/institutional planning and counseling. Mapping the student’s path to postsecondary success is crucial” (Pusser et al., 2007, p. 12).

Students in this study also expressed a need for additional support aids, including: time to prioritize school work; flexible school and work schedules to balance competing demands; help to meet the financial obligations of school, especially tuition remission from employers; and adult-friendly student perks such as credit for previous work experience. For some students, taking on-line courses was the only way to accommodate school, work, and family commitments. Bill said, “*The thing that I need is a school that is strictly Internet. I could take classes, work hard at home on the Internet and not have any interference [with work].*” Neal’s comments reveal the critical importance of support for older adults transitioning back into college:

*The people I have met while being an adult student . . . have been very kind and helpful in my pursuit of a degree . . . from my instructors, to my academic advisor, to my fellow students, to the friends and family that supplied moral support. It was not an easy choice to make to return to school, and the support and help I have received made my decision to return a positive experience. I am not sure that I would have had the commitment to complete my education without that support.*

#### Discussion

Despite the limitations of this study, the findings inform adult education practitioners about the perspectives and support needs of Older Boomer students going back to college. Several persistent themes surfaced concerning Older Baby Boomer students’ return to college. First, they are mostly first generational students who need a better understanding of the formal higher education process. Second, students in their 50s and 60s are primarily motivated by career aspirations, not personal enrichment. Finally, they experience complex support needs while transitioning back into college. These findings suggest several program and policy implications for creating an adult-friendly higher education environment.

First, since most OBB students are first generational college students, there is a need for a structured experience for older adult learners to become more familiar with the higher education process, not unlike the current efforts to orientate traditional aged students through First Year Experience programs. Advisors could be trained to develop transition workshops for older adult students (Schlossberg, 1990). What specifically do they need to know about the higher education process? Several suggestions came from the participants themselves, including: (a) adult student orientation on web-based classes and the electronic registration system; (b) “how to” help sessions on paper writing, grammar review, library research; (c) referral to campus services—career, math tutoring, childcare, financial aid, bookstore; (d) tailored course sequencing and degree completion planning; and, (e) availability of a peer phone support system where they can ask questions of more seasoned students.

Since most OBB students seek degrees for career reasons, and they are sometimes impeded by a lack of knowledge of what career options they could pursue, another implication of this study is that the higher education experience of older adults must be career relevant. Opportunities for career relevance include: (a) contextual learning experiences such as internships and job shadows; (b) involvement of alumni to assure relevance of BGS degree; (c) access to career testing, advising, and exploration opportunities; (d) advisement on appropriate, expedient career paths for those seeking new careers—e.g., teaching on a provisional certificate; (e) referral to appropriate continuing professional education opportunities (beyond degree completion) and professional associations; (f) student workshops addressing transferable skills identification, resume building, networking, interviewing; and, (g) advisement specific for military retirees

transitioning to civilian careers and for homemaker students transitioning into formal employment.

A third implication of adult-friendly higher education environments is the need to provide structures for informal mentoring opportunities which enable OBB students to both give and receive support. For example, the creation of a Peer Advisory Committee could voluntarily match newly enrolled OBB students with peers who are further along in BGS program and can address their questions. Intergenerational programs involving traditional and non-traditional BGS students could be centered on mutual career interests. Work seasoned OBB students could be role models for traditional age students while younger students could coach older students about the access and use of technology-based learning resources. Another support structure could be Adult Interest Groups, facilitated by advisors but led by students or alumni. Groups would be theme-based and address issues of importance to OBB students such as: (a) humanities, (b) spirituality; (c) gender-specific issues; (d) math study groups; and (e) pre-professional interests. Adult Interest Groups would tap into the wealth of expertise garnered by adult learners' life experiences and possibly increase solidarity among older students.

#### Conclusion and Recommendations

While this study focuses on the individual learner's development while seeking bachelor's degrees at a public four-year university, future studies might also focus on the adults' attainment of associates or graduate degrees, as well as bachelor's degrees at different types of higher education institutions. Does the type of institution reflect why these students are returning and impact the support needs they have while seeking degrees?

Gender differences in OBB's college expectations, career aspirations, and support needs

could also be explored in future research. For example, in this study, all of the participants interested in attending graduate school are male. Similar research could be conducted with the lower edge of the Baby Boom population to ascertain whether their higher education experience and needs are different. Finally, further research could examine policy changes required of employers to provide better support to older adult employees seeking higher education.

### Final Thoughts

It was an honor and a privilege coming to know these OBB students and the roads they traveled to return to college. Many have overcome personal adversity on their journeys such as job loss, cancer, financial difficulties, and early parental deaths. Yet, given appropriate support, these adult students can flourish in their individual endeavors and collectively change the face of higher education for the better. Indeed, older adult graduates could become our nation's best advocates for attainment of post-secondary education and the corresponding benefits of increased economic opportunities and improved quality of life.

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## CHAPTER 5. OLDER BABY BOOMER STUDENTS: THE IMPACT OF COLLEGE LEARNING EXPERIENCES ON ADULT TRANSFORMATION

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### Abstract

How does going to college impact older adults' cognitive development and personal transformation? This phenomenological study examined the learning experiences of nine Older Baby Boomers (OBB), ages 50–62, pursuing bachelor's degrees at a Midwestern university. Mezirow's transformative learning theory provides a theoretical framework for the findings of this study and is augmented by Schlossberg's transition model and Kegan's constructive-developmental approach. Findings from qualitative interviews and participant reflection questionnaires indicate that OBB students are serious learners, dedicated to academic success, with high learning expectations. Most use positive coping strategies to approach learning. Their learning experience resulted in increased cognitive capacities which precipitated experiencing college itself as a transformative learning process. Implications for fostering transformative learning in older adult students are suggested.

### Introduction

#### *The Learning Experiences of Older Baby Boomer (OBB) College Students*

Adults are a powerful presence in college classrooms today, accounting for 40 to 45% of the undergraduate population (NCES, 2002). They are going to school in record numbers for additional education and training (Kim, Collins-Hagedorn, Williamson, &

Chapman, 2004). This rapidly growing segment of the higher education student population has resulted in nothing short of an adult degree revolution (Maehl, 2004).

The increasing demand made on higher education by adults is accentuated by the expansive Baby Boom generation (77 million), the first cohort of which turns 65 in 2011. Recent surveys indicate that 70–80% of Baby Boomers say they plan to work at least part-time after the typical retirement age of 65 (Pusser, Breneman, Gansneder, Kohl, Levin, Miliam et al., 2007). Trends of working after retirement may seem oxymoronic, but for most people it makes good personal, financial, and societal sense. Many Boomers will need to work for health insurance and greater economic security. Others may not have a financial need to remain in the workforce, but want the structure in their lives, the social connections, and a sense of identity and purpose (Freedman & Moen, 2005). According to Googin and Ronan (2004), Baby Boomers seeking college education:

Will be looking for customized programs for re-careering rather than college's traditional occupational programs. Traditional student services will likely leave this population wanting something different. . . . They will want and need guidance, resources, and pathways to new opportunities, many of which will require additional learning or credentials. (p. 3)

Certainly the aging of baby boomers brings unparalleled challenges and opportunities to institutions of higher education. Since colleges and universities have been traditionally geared to serve young adults (Hagedorn, 2005; Pascarella & Terenzini, 1998), however, much change is required. In facing this challenge, adult educators could benefit from understanding the origins of adult education. While some narrowly construe the primary purpose of adult education as furthering the bottom line and advancing training, historically the roots of adult education were based in humanism—in community action, social development, and the social gospel. In 1926, when Eduard Lindeman published *The*

*Meaning of Adult Education*, he envisioned that “Adult education will be via the route of situations, not subjects . . . the resource of highest value in adult education is the learner’s experience . . . .authoritative teaching, examinations which preclude original thinking, rigid pedagogical formulae—all have no place in adult education” (as cited in Glowack-Dudka & Helvie-Mason, 2004, p. 7).

Andragogy—what adult education has come to be called since Lindeman’s time—indeed has very different philosophical underpinnings than those typically found in K–12 education and college programs serving traditional aged students (Knowles, 1980). Adult educators must utilize different instructional strategies than the teacher-centered and subject-centered pedagogy used to educate children. Like Knowles, Mezirow (1997) contends that adult learning,

Requires a form of education very different from that commonly associated with children. New information is only a resource in the adult learning process. To become meaningful, learning requires that new information be incorporated by the learner into an already well-developed symbolic frame of reference. (p. 10)

Mezirow describes learning in adulthood as a developmental task which “may be understood as a learning process—a phased and often transformative process of meaning becoming clarified through expanded awareness, critical reflection, validating discourse, and reflective action as one moves toward a fuller realization of agency” (Mezirow, 2000, p. 25).

Since adult learners come to the classroom laden with life experience, they require a learning environment in which they can articulate and critically reflect on this experience. Adult educators can help students examine how new information impacts their previously learned worldviews. Therefore, learning is to be understood as more than simply a formative process of acquiring incoming knowledge and adding it to existing perspectives of meaning.

Instead, as learners develop into adults, their capacity to challenge the validity of new knowledge grows, as does their ability to create new intentional experiences (Mezirow, 2000). This capacity to construct new meaning from their experience enables adult learners to enter into transformative learning.

To understand transformative learning, it is helpful to distinguish it from subject- and consumer-oriented learning (Cranton, 1994). Adult students are often described as pragmatic and seeking specific information to improve in their work. This desire to acquire content knowledge and skills is typically met through subject-oriented learning. Here, the focus is on mastery of theoretical or practical skills, facts, concepts, and problem-solving strategies. This type of learning has long been the focus of higher education, as well as professional development activities. In this perspective, teachers are the experts with the knowledge, and students are expected to gain the technical knowledge.

It is often assumed that adult learners are self-directed and able to identify their needs, set objectives for learning based on those needs, select materials and strategies to proceed with learning, and are able to evaluate their own learning success. Cranton (1994) identifies this view of adults as fitting into consumer-oriented adult learning. Here, students perceive education as a convenient commodity for surmounting problems which they must personally solve. Learning is the means to an end, with the practical purpose of directly meeting student needs. The student determines what is necessary to get to his or her desired ends.

Adult learning often involves both subject-oriented and consumer-oriented learning. But learning may also be transformative, which is not mutually exclusive to either subject-oriented or consumer-oriented learning. Most often transformative learning is

emancipatory and experienced as “a process of freeing ourselves from forces that limit our options and our control over our lives, forces that have been taken for granted or seem as beyond our control” (Cranton, 1994, p. 16). Emancipatory knowledge is gained through critical reflection upon one’s assumptions and not merely knowledge gained from technical and practical learning. Usually new behavior or action comes about due to changes in the learner him/herself. The task, then, of assisting adults in reinterpreting the meaning of their life experience requires educators to facilitate transformative learning. Both Cranton (1994) and Mezirow (2000) suggest that this has been a key goal of adult education throughout time and across cultures.

Parks (2007) echoes these sentiments. She suggests that the role of higher education is to engage students in complex thinking which advances the paradigm shift from a consumerist model of education to a model which cultivates humanity. Parks challenges adult educators to promote citizenship and self-authorization by mentoring students to shift from conventional to critical thinking; from interpersonal to systemic ethics; from trusting authority to discernment; from gut assessment to evidenced-based instruments; from certainty to mystery; from good self to complicit self; from tribe/centrism to complex community. Likewise, Mezirow contends,

A defining condition of being human is that we have to understand the meaning of our experience. For some, any uncritically assimilated explanation by an authority figure will suffice. But in contemporary societies we must learn to make our own interpretations rather than act on the purposes, beliefs, judgments, and feelings of others. (1997, p. 5)

Adult education theorists such as Mezirow, Cranton, and Parks seem to be calling for an intentional return to the humanistic origins of adult education. But, does that reality describe the learning experience of today’s OBB college students? We are led to the primary research



question which guided this study: What is the learning experience of OBB college students, and how does it influence their cognitive development and personal transformation?

### Background of Study

This study was one portion of a larger, phenomenological study that examined the experiences of degree-seeking OBB students to understand how psychosocial, cognitive, and spiritual dimensions of adult development influenced both their learning experiences in higher education and their future vocational aspirations. The research themes which emerged from the larger study included, but were not limited to, the following: adult learner characteristics and reasons for enrollment; higher education support needs; adult transformative learning; self-identified cognitive, psychosocial, and spiritual development; vocational concerns of meaning, purpose, and service; and retirement plans.

The fundamental structure of the phenomenon of pursuing college degrees, as perceived by these OBB participants, was a self-identified transformative learning process influenced by improved cognitive capacities and acquired in a supportive, adult-friendly higher education environment, which enabled students to successfully transition not only toward degree completion and ensuing career enhancements, but toward meaningful future aspirations grounded in personal spiritual beliefs.

This statement describes the phenomena of OBB students seeking bachelor's degrees at a Midwestern university and engenders possibilities too numerous to explore in a single study. Key focal points for this study were: (a) individual learner characteristics and expectations of OBB students; (b) how OBB students manage learning as they move through college; and (c) cognitive changes that result from college learning and precipitate experiencing college as a transformative learning process.

## Research Design and Analysis

Transformative learning has its roots in constructivist learning theory, which maintains that “learning is a process of constructing meaning; it is how people make sense of their experience” (Merriam & Caffarella, 1999, p. 261). Likewise, this study is located in the constructivist epistemology and uses an interpretive theoretical perspective. Knowledge is presumed to be socially constructed, truth is relative, and meaning emerges inductively. What is real and meaningful is a construction in the minds of individuals, not an objective truth out there merely waiting to be discovered.

Drawing upon the tradition of phenomenology, this study utilized a naturalistic qualitative inquiry process to focus on the essence of meaning that individuals construct about particular phenomena or experiences, within the constraints of culture (Bogdan & Biklen, 2003; Creswell, 2003; Merriam, 2002). A purposeful sampling strategy was used to select nine participants between the ages of 50 and 62, who were currently enrolled in (or had recently graduated from) the Bachelor of General Studies (BGS) degree program at a Midwestern university.

As typical in an interpretive research process, in-depth narrative information was attained through semi-structured participant interviews and document analysis (Creswell, 2003; Seidman, 1998). Primary data collection methods consisted of: (a) two 90-minute individual interviews, (b) one 30-minute phone contact (which served as a third interview). All interviews were audio taped and transcribed verbatim. Secondary data consisted of one reflection questionnaire and a review of archival print and web materials describing the BGS program.

Data were systematically analyzed first by a holistic review of the data which was followed by a more focused, three step examination process. Data were dissected into the smallest units of meaning in order to discover any significant statements of reality from the participants' perspectives. Then, data were pieced back together inductively in new ways to produce meaningful interpretations of participant statements. Finally, persistent themes of meanings emerged from the data analyses and were used to craft an exhaustive description of the phenomenon (Bogdan & Biklen, 2003; Creswell, 2003; Esterberg, 2002).

Multiple strategies were utilized to verify conclusions and validate the findings including: (a) triangulation of data, (b) presenting negative or discrepant information, (c) retaining access to participants for continued member-checking, and (d) utilizing both a peer reviewer (a seasoned academic advisor in the BGS program) and an external auditor to develop "intersubjective consensus" (Creswell, 2003; Miles & Huberman, 1984).

#### Theoretical Framework

To understand the approach to and impact of learning on OBB college students, it is helpful to analyze findings within the context of three adult learning and development theories. Jack Mezirow, often regarded as the originator of transformative learning theory, is the primary theorist used in this study to explore the issue of how adults learn. Nancy Schlossberg's transition model offers a conceptualization of how adult learners cope while transitioning through the college learning process. Finally, Robert Kegan's constructive-developmental approach addresses the interactive and structural dimensions of adult learning and is complimentary to the central tenets of transformative learning theory.

*Mezirow's Transformational Learning Theory*

How does one engage in the transformative learning process? Learning involves changing meaning perspectives by elaborating existing frames of reference, by learning new frames of reference, by transforming points of view, or by transforming habits of mind. Mezirow identified several phases of meaning one typically traverses through toward transformation: (a) a disorienting dilemma; (b) self-examination with feelings of fear, anger, guilt, or shame; (c) a critical assessment of assumptions; (d) recognitions that one's discontent and the process of transformation are shared; (e) exploration of options for new roles, relationships, and actions; (f) planning a course of action; (g) acquiring knowledge and skills for implementing one's plans; (h) provisional trying of new roles; (i) building competence and self-confidence in new roles and relationships; and (j) a reintegration into one's life on the basis of conditions dictated by one's new perspective (Mezirow, 2000, p. 22).

In essence, the learner experiences disequilibrium in his or her thoughts and may experience painful or uncomfortable emotions. These experiences and responses then result in a critical discernment of what makes sense. If transformation occurs, the learner is able to reframe the problem and reintegrate his or her experience into a different, more sensible framework. When adult learners reflect on their biases and assumptions, they are often able to recognize and overcome their distorted misconceptions.

#### *Nancy Schlossberg's Transition Model*

Since this study focused on understanding OBB students' learning experiences as they transition through college, the "moving through" portion of Schlossberg's theory provides a relevant framework for study findings. Moving through a transition entails "hanging in there" and balancing competing commands (Schlossberg, 2006, p. 166).

Central to Schlossberg's model are four factors that influence a person's ability to successfully cope with change: situation, self, support, and strategies. This study examines the strategies that participants use to cope with the stress of college learning, including the sometimes long plateaus toward degree completion. Bobby, for example, seemed to have reached a plateau and was feeling stuck in the midst of his degree completion program,

*I don't have that good of an attitude towards the whole school, to tell you the truth. It's really getting to be a drag. But, it would be easier to swim the rest of the way across the river than to turn around and swim back. That's kind of how I feel about it. I've come this far, and I would not like myself if I didn't finish.*

To understand this phenomenon of older adult students moving through the higher education experience, it is helpful to examine strategies they used to approach learning. Other key focal points in this study were how college impacted students' cognitive capacities, and whether they are transformed through the college learning process.

#### *Kegan's Constructive-Developmental Approach*

Kegan's (2000) constructive-developmental approach is based upon two premises about adult learners—constructivism and development. Humans are actively constructing reality, and the very principles with which humans do the constructing can change. Kegan describes this as the difference between informative learning and transformative learning. Informative learning is aimed at increasing our fund of knowledge, repertoire of skills, and already established cognitive capacities; it involves a kind of leading in, or filling of the form. Transformative learning, on the other hand, puts the form itself at risk of change (and not just change, but increased capacity). In other words, to experience transformative learning requires not only changes in *what* we know, but changes in *how* we know.

## Findings

Data from this study suggest that while moving through the college experience, OBB learners: (a) are serious students, dedicated to academic success and having high learning expectations; (b) use positive coping strategies to approach learning; and (c) attain increased cognitive capacities which precipitate experiencing college itself as a transformative learning process. Implications for fostering transformative learning in older adults are suggested.

### *Learning Expectations of OBB Students*

Although adult students typically do not have the time to get involved in on- and off-campus activities to the same extent that traditional age full-time students do, their commitment is shown by intellectual growth and academic development which is equal to or greater than younger students (Graham & Donaldson, 1999). Generally, older adult learners tend to see themselves as responsible, self-directed, and independent learners with a large, diverse stock of knowledge and real-life experience from which to draw (Knowles, 1980).

OBB students in this study fit this description. They are serious, focused, and dedicated learners, holding high expectations of their college learning experiences. As such, they regulate their learning; hold themselves to high academic standards; have a positive attitude toward learning; expect learning to be applicable to work; have low tolerance for unchallenging, unprepared faculty; and set deliberate learning goals which improve their *self-efficacy*. Bandura (as cited in Schlossberg, 2006) defines self-efficacy as the “belief that one can make a difference in one’s own life and have an impact on one’s environment” (p. 104).

### *Self-Regulated Learning*

Typically, adult students engage in self-regulation which occurs when the learner regularly makes decisions regarding how to organize incoming information (Silverman & Casazza, 2000). Self-regulated learning enables learners to actively control their learning through the establishment of goals that enhance motivation and self-efficacy. Self-directed learning occurs as adults free themselves from externally imposed direction in their learning and become proactive, initiating individuals in reshaping their own experience.

*Academic goals.* In this study, all participants mentioned the importance of setting goals and described acquiring an almost single-minded dedication to completing their degrees. Leonard said, *“I think you have to believe in yourself, what your goal is, and you have to determine that you’re gonna meet that goal.”* Rita also expressed an attitude of dedication,

*I felt that I always have to prove something to them, that I succeeded even though I failed so young. And that gave me my goal. I don’t wanna put too many things in my basket right now. I’m trying to focus on school. I figure if nobody is gonna encourage me, I’m gonna do it for myself. I just want to excel for me—not for being the Hispanic, not for being a woman—but to know that I can accomplish things just like anyone else—staying on track.*

When comparing his current experience to his traditional age college experience, Bill said, *“I am much more centered down, I guess, goal directed.”*

*Self-efficacy.* To become self-regulated, learners must make direct connections between their use of strategies and outcomes (Silverman & Casazza, 2000). For example, Bobby said that as a result of pursuing college studies, *“I’m more responsible, I care to get things done. I’m more reliable, those types of things.”* Then, as the process of self-direction continues and the internal commitment to the process grows, learners increase their sense of self-efficacy. Paul said,

*My thing was always my commitment level. That's what scared me. It wasn't an ability thing. It was just like, how bad do I want this? One thing I didn't want to do was go and embarrass myself. But, I think as I went along, I got more and more confident. As I started to get more focused, and I started to get better grades then I kinda thought to myself, 'Yeah, I can do this. I CAN do this.'*

Participants described their most meaningful learning experience in their higher education process as simply the realization that they could do it—complete a degree successfully. Neal said,

*The most meaningful experience is just being knowledgeable that this is possible; I can do this. It takes away some of those doubts of being an older student. It's difficult, but you can achieve if you want to. I've developed this attitude that if I'm not going forward, I'm not staying in the same place—I'm losing ground.*

Alice, too, reflected,

*I have the capability of doing things that I never thought I could. In the past I didn't have a lot of self-confidence. Now, I realize that I could succeed at this. I just put my mind to it, and I don't know if there's anything that's going to stop me.*

#### *High Learning Standards for Self*

In general, adult students over the age of 25 earn higher grades than younger students in both developmental and college level courses; grade performance improves with age (Hagedorn, 2005). In this study, compared to their college attempts as traditional students, most participants set high academic standards and made serious efforts to apply themselves.

Marge said,

*As an older person, I need to prepare myself many days before the test. There's hardly a day that I don't do something with school. [When] I was young, I wanted to have fun. I didn't know what was going on in the world. Vietnam. The Civil War. I studied them but didn't really care. I guess I care more now.*



Paul recalled, “*Once I decided to finish my degree and I got more mature, my goal in every class was to get an A.*” Alice said, “*I put every spare minute into studying. I’m succeeding to the point of—my husband says I’m obsessive with it, and if somebody looks up obsessive in the dictionary, they’ll see my picture. I got an A plus.*” Bill said, “*I kind of like getting into science and math again and, got an A out of it, A plus, whatever.*” Neal, who began the BGS program as an unemployed, full-time student, said, “*One of the things I had to do was consider going back to school as being my current job or employment.*”

#### *High Expectations of the Learning Experience*

Although OBB students strive for high grades, they seem to prioritize learning over performance. This value shift from performance goal orientation (task completion) to learning goal orientation (the valuing of internal knowledge and competence and the desire to continually improve oneself) is typical of learners their age (Bridges, 1980; Morris, Brooks, & May, 2003). Because of this learning goal orientation, OBB participants valued an intellectually stimulating and challenging learning environment. They expected relevant, applied learning opportunities and had low tolerance for faculty that did not engage students in active learning. OBB students also preferred a social learning environment.

*Applied learning.* Because older adult students have a broad knowledge base and abundant life experiences from which to draw, “the challenge of learning is both to incorporate new knowledge into current knowledge structures and to modify past models into new conceptual structures of knowing the world” (Kasworm, 2003, p. 82). OBB participants in this study expected meaningful learning experiences which were applicable to their own lives. Neal said,

*I was able to take life experiences and apply them to what I needed to*

*do—being able to see some of my tacit knowledge applied and [knowing] that I wasn't crazy for thinking this, that it really was real.*

Leonard said, “*When I do get into more of the counseling classes, I do want to find out, not only techniques that work but the ones that don't.*” All participants with full-time work experience mentioned the importance of applying their college learning experience to the benefit of work situations. Kate realized, “*A lot of things that they talked about in those classes actually apply to what I'm doing in my job.*”

In addition to expectations of applied learning experiences, OBB students did not want to take classes they perceived as unnecessary or duplicative of prior knowledge gained. Thus, acknowledgement of their experiential life knowledge from faculty is an important issue for OBB students. Bobby said,

*I have to focus on a positive attitude when what they're talking about in class, I work in that environment everyday, and I know more about it than maybe somebody that's studied it in a book and now is teaching it.*

OBB students also want academic credit for work experience. Alice said, “*I think you should be able to say, 'This is what I did in my work environment'; I should get some kind of credit.*”

*Challenging faculty.* As with their work experience, OBB students sought intellectual stimulation from their higher education experience. Paul described his favorite class, “*I took a constitutional law class, which was very difficult. I enjoyed it. I learned a lot.*” They not only had high expectations of their personal performance, but had high expectations of faculty as well. Many expressed little tolerance for instructors who were not challenging and did not employ active learning techniques. Marge said,

*My instructors are very diverse and sometimes have been closer to my age. I find myself much more critical of them. I have much higher expectations. I*

*want them to motivate me and challenge me. I'm disappointed if they don't.*

Likewise, Bobby said, *“Some of these classes, a sophomore in high school could pass. There's a lot of this stuff that's just phenomenally simple.”* Bill said, *“Deep down inside, I like challenges and I like to learn. I don't know where I get it, but I like to learn intellectual things. I like to read a great deal, know information, put it together.”*

Although not referring to the majority of faculty members, participants mentioned being frustrated with faculty who were not prepared. Alice said,

*One of the things that bothers me is that you get instructors that have no teaching background. They are business people, and not that they can't be a good teacher. Before they are hired as a teacher, they should have some type of teaching classes, because they don't know how to teach.*

*Social interaction.* Changed ways of knowing—or learning—primarily occur through the means of social interaction and adaptability (Silverman & Casazza, 2000). Kegan (2000) contends that adults are not simply individual learners unto themselves; rather, the social surroundings and physical setting, a notion called *situated cognition*, affects their learning. In this contextual view, adults learn as they participate by interacting with the community, the tools of learning, and the moment's activity. Thus, it is through interaction with realities outside of themselves—other students, discrepant experiences, faculty—that adults are able to perceive realities differently and in more meaningful ways.

Perhaps this is why participants preferred the greater depth of social interaction found in the traditional face-to-face classroom rather than other delivery modalities. They placed great value on this socialization as indicated in one participant's words, *“You had the ability to ask the questions. To be able to get the reflection of the instructor at the time he's talking and the instant feedback from the other students.”* Likewise, Leonard said,

*I like a classroom environment. I like the interaction. I like to be able to hear different points of view. I took one on-line class. I enjoyed it, I learned a lot. I did fine in the class, but it wasn't what I really wanted to do. If I had my preference, I'd always be in classroom.*

Rita, too, enjoyed the classroom interaction, “because someone else has chimed in and given you more objectives, as opposed to you just seeing it one way—your way.” Bill was the only participant who did not have a strong preference for learning through social interaction. It is interesting to note that he seems to prefer subject-oriented learning:

*I hate to say it, but I just want to get down to business. I don't want to underestimate the personal context. I think it's important for a lot of people, but for me, it's more of a pragmatic thing. Just give me this stuff, let me look at it, give me a guideline, tell me what I'm supposed to be doing, what are the expectations, and then I will accomplish it. I'm not into the connectedness. So doing this—Internet classes—is okay with me.*

#### *Positive Coping Strategies*

It is obvious that the OBB participants in this study are dedicated learners who bring high expectations of both themselves and their professors to their college learning experience. Although their efforts are admirable, how do they cope with the stress of learning while “moving through” their college experience? Schlossberg’s transitional model identifies several positive coping strategies which are used by adults during times of change and transition (2006). In this study, three coping strategies were common to most OBB students’ successful management of their learning processes—reframing, an attitude of hope, and spirituality.

*Reframing.* Reframing refers to the development of alternative meaning that is credible and believable (Schlossberg, 2006, p. 107). Initially, OBB students transitioning through the BGS program feared failure and lacked confidence in their academic abilities.

Perhaps this was because participants had experienced academic difficulties and failure during their previous learning experiences, most as traditional aged college students. Participants had to overcome doubts and fears by reframing a perception of self as academic failure to one of success.

Participants were driven by a propensity to overcome learning fears. Neal remembered, *“The fears were, you know, not having been successful the 1<sup>st</sup> time, was can I really do this?”* Remembering her traditional age college experience, Marge said, *“I failed most of the classes I took. It was terrible. I’m really ashamed of it.”* She adjusted her current approach to compensate,

*Now, I try really, really hard. I’m so afraid of failing because I failed before. I think that’s another very strong motivator for me, because I don’t want to repeat those past mistakes. So I never skip class, I read everything I’m assigned and I study like 50 times more than the average person does.*

Reframing their prior perception of self as academic failure was one positive coping strategy used by participants to navigate their current college learning experience. Alice said that originally, *“I didn’t go back, because I didn’t think I would be good at it, and I won’t do something if I figure I’m gonna fail.”* Then, although tentative when starting the BGS program as an older adult student, she eventually came to see herself as something other than a drop-out,

*So, it was just nerve-wracking to walk in the door the first time. I didn’t tell anyone except for my husband and kids, and I swore them to secrecy that they would not tell anyone I was going back to school. My fear of failure, that if it didn’t work out, and I decide I never want to do this again and someone asked me, how are classes and I’m like, I’m a drop-out. I thought, no, I’m NOT a drop-out.*

Marge reframed a previous perception of herself as stupid to one who is merely ignorant and wanting to learn more. She said,

*Sometimes I still feel kind of dumb that I don't know anything but not in a bad sense like before. Before I made stupid choices, and now I might feel dumb about some things, but it's not because I'm making stupid choices. It's maybe just that there's still room for me to learn more.*

Neal, a recent BGS graduate, seemed surprised by how well he performed academically and came to see himself as a successful student, *“I never thought I'd, first of all, go back to school, secondly, graduate from school, third, be on the chancellor's list three times, the dean's list four times. That was not in my realm.”*

*Hope.* Schlossberg describes hope as the passion for the possible. Hope is an important coping strategy during times of transition because positive emotions can foster positive experience and a sense of optimism, *“a belief in the ability to change one's life through one's own efforts”* (Schlossberg, 2006, p. 110). Generally, OBB students expressed hope about their college experience and had an optimistic, positive attitude toward learning. Indeed, many have come to appreciate education as adults. Marge said, *“To me, I look at this experience as a luxury. Just the learning— maybe it's just to keep me alive, keep me enthusiastic about life.”* Alice's optimism pervades her learning and life experience,

*My philosophy of life could be summarized as . . . think of your cup as full (or at least half full), never empty. I'll always be a life long learner and if life throws me a lemon, I'll make lemonade. I'm not saying that there won't be struggles and hardships in the future. But when they do come, I will pick myself up and brush myself off. I learned early, life goes forward whether you want it to or not.*

*Spirituality.* Many midlife transitions are accommodated by a need to make meaning of the transition and of life itself. Often in midlife there's a *“recommitment to spirituality, defined more broadly than when the adult was younger. . . . [and can include] a belief in a higher power; hope and optimism worship, prayer and meditation, purpose in life, love and moral values”* (Schlossberg et al., 2006, p. 101). In this study, most participants indicated

that their personal faith was central to their daily life as expressed in an awareness of a higher power, gratitude for blessings, regular prayer and meditation. Leonard said, *“I seek inspiration by reading the Bible daily and talking and listening to God, though I know I do not always find the time as I should.”* Alice strives to do *“whatever it takes to be happy and be at peace with yourself . . . by reading the Bible, by meditating or going for a walk, or reading, you have to find your own way. It’s not ah, cookie cutter.”* In short, spirituality served as a key coping mechanism, helping students be calm, centered, and focused during their educational journey. Rita shared, *“I always try to ask for guidance to make sure I’m doing the right thing. If I don’t feel content and I feel something’s not right—I always ask God, ‘Okay, God where are you taking me?’”*

#### *Cognitive Changes—Laying the Groundwork for Transformative Learning*

How does college learning affect the cognitive development of OBB students?

Participants in this study experienced several cognitive changes while transitioning through college, including increased: (a) ability to think critically, (b) capacity for ambiguity and complexity, and (c) tolerance for others. These changes in cognitive thinking abilities were a necessary prerequisite to experiencing college as a transformative learning process.

#### *Increased Ability for Critical Reflection*

The distinguishing feature of transformative learning is that it involves critical reflection. Often a life crisis, called a *disorienting dilemma* or *trigger event* by Mezirow, will precipitate critical thinking about one’s long-held views, values, and priorities. The learner must reflect on the very assumptions that support his or her beliefs about and perspectives of the world. This reflection can lead to a fundamental change in the learner’s meaning perspectives, which is then integrated into his or her life. Often the resulting

change is not only recognized by the learner but also by those with whom the learner interacts.

The capacity to become critically aware of one's own cognitions through critical reflection enables the learner to make adaptations and guide their own learning more effectively. Participants in this study recognized within themselves a growing ability to think more broadly, deeply, and critically about topics addressed in their classes. Marge said,

*I feel like I think about things deeper than I used to. I think about things that I didn't think about before, world issues that now really interest me. It [school] just kind of made me think more serious thoughts than just wanting to have fun all of the time. Just trying to understand how the world works, outside of my little, tiny world. It's huge. It's enormous. I wonder about things.*

Paul said, *"I think a lot of times the more education you have, the more you question. And that's what education's about."* Bill agreed, when reflecting upon a recent sociology class,

*I think the content of what I'm learning in school, it opens my mind up more. I'm asking more appropriate questions and looking more deep into the problem. It teaches you to see more angles. Sometimes, I start looking at it from an analytical perspective.*

Kate said,

*In high school I just did the work to get the work done. Now, I'm always thinking. I look around and notice things a lot more. I step back and look. I probably look at the news a lot more.*

Bobby poignantly said that school taught him, *"How to think rationally and not emotionally."*

#### *Increased Capacity for Ambiguity and Complexity*

Adult educators propose that dialectical thinking, which acknowledges differing points of view, is the signature of mature adult thinking because it "allows for the acceptance of alternative truths or ways of thinking about similar phenomena that abound in



everyday adult life” (Merriam & Caffarella, 1999, p. 153). In negotiating the complexity of our daily environment and the complicity of ourselves, mature thinkers develop a tolerance of ambiguity and operate from a higher level of consciousness (Kegan, 1982; Parks, 2007).

In this study, OBB students indicated that their college courses increased their experience of dialectical thinking. Rita was concise, “*I’m open now to different things.*”

Kate indicated a tolerance for ambiguity and complicity when she said,

*You learn that things are not black and white. I always look outside the box. Like, if someone gives me a problem, then I’m always thinking about every situation revolving around that, trying to solve that problem. What would happen if this would happen, or they asked this question instead of that question?*

Likewise Alice said,

*I’m seeing there’s two sides to everything or there’s more to think about than just the way I’m thinking. Before I could just spout off on something, but now I’m thinking, wait a minute, there’s another side to this. I’ve learned to find out everything before you make a judgment. I think it comes from not only going to school but having your instructors making you validate what you’re saying or giving you another opinion on it. I think it’s really good.*

#### *Increased Tolerance of Others*

Several participants acknowledged that their college education experience led them to a greater tolerance for others who are different from them. Learning experiences increased their empathy and cultural sensitivity. For example, Alice said,

*The people I have met while being an adult student give me a better perspective on the world. The world is not just my house, my block, my college, my town, the US, but the whole world with many people and places to learn from. There’s a big world out there and people believe in different things. And what works for one person doesn’t necessarily work for another person. Everybody has to find what fits them.*

About his learning in a recent sociology class, Bill said,

*Not to be trite, but I worked with a lot of people from different backgrounds, particularly minorities and sometimes I’ve been a little more insensitive, and I did*

*have a few stereotypes. Sometimes I think I would have been more understanding of those situations. The idea is to be very open, very perceptive in knowing what other people are thinking and doing. I do think education serves that function.*

Marge wondered,

*Why do some people behave certain ways and other people behave other ways? I don't wanna be one of these people that's just so ignorant, that you can't understand why people are downtrodden in one part of the world, because you just purely are ignorant. And you criticize them for being that way, when you don't know where they came from, the history of their life.*

Kate expressed a value of tolerance, *“To make a difference for others or improve the human condition, I would be more tolerant of people and their beliefs and/or life styles.”* Referring to his college experience, Bobby said, *“I think how I've grown as a person is rather than get upset with ignorant people, I kind of feel for them now. Just because they're uninformed, and they don't know.”* Neal, too, developed more tolerance toward others:

*I used to think that older people went back to school, because they had nothing better to do. They would take classes just to get out of the house. That's not the case at all. And, another thing I see differently is the young people. I thought kids would be coming to school just to go to school, with no real goals, or [because] it was better than getting a job and moving out of [their parents'] house. But, there are some real purpose-driven, oriented young people.*

*I live in a lot more acceptance now than I used to—acceptance of the people in my life, of whatever journey they've chosen. [In the past] you had to meet these qualifications if you wanted to be my friend or be close to me. As an example, if you had tattoos, you were just a bit strange for me, and you didn't fit into my little lifestyle. I'm a lot more accepting of other people. So, it's opened up a lot more opportunities to meet people, to let those people influence my life.*

#### *Epistemic Change and the Transformative Learning Process*

All OBB participants gained increased cognitive capabilities as a result of their college learning experience. They also acquired increased knowledge levels, as expressed by Bill:

*The college experience has increased my knowledge, which gives me a larger context within which to think. Education in itself is not salvation. It just provides the basic material and opportunity for me to understand the world around me better and leads to a sense of enlightenment. Enlightenment in the true sense that I become more aware as I have more knowledge and can perceive and ask better questions to learn more about the world and its opportunities.*

However, as suggested by Kegan (2000), transformative learning is more than merely increasing what we know or refining our critical thinking skills. He writes, “Genuine transformational learning is always to some extent an epistemological change rather than merely a change in behavior repertoire or an increase in the quantity or fund of knowledge” (p. 48).

Furthermore, transformative learning “is a call for a particular epistemological shift, the move from the socialized to the self-authoring mind” (Kegan, 2000, p. 65). In other words, learners not only see themselves through the lenses of their prior experiences but through reflection on those experiences. “Those moving toward self-agency and self-authorship increasingly recognize their responsibilities for their actions, choices, and values and for the decisions they may make based on those values” (Taylor, 2000, p. 163).

Is this the case for OBB participants in this study? Was their experience of learning in college genuinely transformative? Did they experience epistemic change not only in what they know, but in how they know? The result of transformative learning process is a freedom to act on one’s own purposes, values, and meanings, rather than relying on those we have assimilated blindly from others. Data suggest that through their college experience, OBB students came to know greater freedom. Marge, for example, became a more discriminating learner, “*I want to do something for me now, just for me. I don’t care if*

*anybody else doesn't understand.*" Cognitive changes laid the groundwork for them to experience college as a transformative learning process.

Before examining indications of transformative learning in individual participants, it is helpful to review the transformative learning process itself. The process can be reduced to four key components. The learner: (a) first experiences some disruptive event that challenges his or her view of the world; (b) then critically reflects on beliefs, assumptions, and values that support his or her beliefs about and perspectives of the world; (c) develops a new perspective to deal with the discrepancies surfaced by the triggering event; and (d) integrates the new perspective into his or her life, exhibited by a changed behavior or action, noticed by self and others (Henderson, 2002).

Findings from this study indicate that OBB participants experienced college as a transformative learning process, although to varying degrees. Table 5.1 indicates the four-phased transformative learning process for each participant, as well as their perceptions about college stress levels and experiences of personal adversity, including academic failure risk factors identified in Levin's research (as cited in Lumina, 2007, p. 6).

#### *Step One—Disoriented Dilemmas*

Each OBB participant's decision to begin the BGS program was triggered by a disorienting experience. For example, Marge felt compelled to break free from a monotonous home life with an unsupportive spouse. She said, *"I think it was me finally just saying either you let me go to school or I'm leaving."* Neal's college attendance as an adult was due to the loss of his job when his employer relocated to another state. He returned to college to train for an entirely new career field and said, *"I guess one of the things—getting out of my comfort zone—was without a doubt going back to school."* For all participants, the

lack of earlier completion of their bachelor's degree was a significant "non-event" that was expected to occur but did not and that then became a trigger to return to college as an older adult (Schlossberg, 2006, p. 35).

*Step Two—Participant Practice of Critical Reflection*

Human beings develop a set of assumptions that filter how one perceives the world based upon past experience. These shape one's meaning structures—expectations, beliefs, feelings, attitudes, and judgments which result from habitual ways of interpreting experience. Since these meaning structures are typically automatic and unconscious, one becomes aware of them only through critical reflection.

In this study, for example, Bobby became aware of previous assumptions about the work world when transitioning from manual labor to a professional career as a computer programmer:

*My first job as a programmer, I was very uncomfortable. I felt inadequate and insecure a lot. I was used to punching a time clock and carrying these stacks of bread around and throwing 'em on trucks. All of a sudden, now I have meetings and [am] sitting in a cube working next to people. At that time it was like, this is really cool, but it took me a long time to realize that I deserved it, and I worked hard for it and that's what happens when you make effort like this.*

Through critical reflection, Marge came to realize that she alone could change her unhappy home life by returning to school:

*If you're unhappy, you need to figure out why you're unhappy and see what you can do to make yourself happy. For years I just stayed home and got depressed and anxious, and I couldn't figure it out. And now, I just—I'm not afraid of discovering what makes me tick and what makes the world tick and why do I do certain things and why didn't I do certain things. I go back and examine my life, and I get mad at myself for certain things I did wrong in the past. But I learned from them. I just want to keep moving forward.*

She overcame her distorted assumption that her only place was in the home.

Table 5.1

*Evidence of OBB Transformative Learning in College*

<b>Participant</b>	<b>1. Disorienting Dilemma (BGS trigger event)</b>	<b>2. Critical reflection on assumptions</b>	<b>3. Develops new meaning perspectives</b>	<b>4. Integrates new perspective into actions and attitudes</b>	<b>Personal Adversity in Life Experience</b>	<b>Apparent Stress Levels during BGS transition<sup>2</sup></b>
Marge	Divorce v. school ultimatum	Very High	Very High	Very High	History of abuse; and marital difficulty; limited family support; some financial concerns	Very High Stress
Rita	Limited career advancement	High	High	High	Single parent; FTE employment limited family support; major financial concerns; minority identity	Very High Stress
Neal	Job loss – relocation	High	High	High	Son's addiction; some financial concerns	High Stress
Bobby	Job loss - downsizing Limited career advancement	High	High	High	Recovered addict; FTE employment throat cancer survivor; some financial concern	High Stress
Alice	Daughter's challenge	Medium	Medium	Medium	Son's addiction; FTE employment; some financial concerns	Low Stress
Kate	Limited career advancement	Medium	Medium	Medium	Breast cancer survivor; FTE employment; some financial concerns	Medium Stress
Paul	Job loss - retirement	Low	Low	Low	Some financial concerns; military retirement – wanted to re-enlist, but could not	Low Stress
Leonard	Anticipated 2 <sup>nd</sup> retirement.	Low	Low	Low	Vietnam; witnessed natural disasters; FTE employment; minimal financial concerns	Low Stress
Bill	Limited career advancement	Low	Low	Low	Work boredom; FTE employment; minimal financial concerns	Low Stress

<sup>1</sup> Personal adversity refers to difficult life circumstances. According to Levin's research on adult learners' risk for failure in the postsecondary environment, all OBB students in this study experienced the risk factor of college re-entry (as cited in Lumina, 2007) and several participants experienced others

<sup>2</sup> Stress levels while transitioning through the BGS program were indicative of negative liabilities outweighing positive assets (see Schlossberg et al., 2006)

### *Step 3—Changed Assumptions Yield New Meaning Perspectives*

Since adult learners have many roles to contend with—being students, parents, employees, community members—their early interpretations of meaning learned as children are typically no longer adequate. Adults may then embark upon a process by which they transform “taken-for-granted frames of reference to make them more inclusive, discriminating, open, emotionally capable of change, and reflective so that they may generate beliefs and options that will prove more true or justified to guide action” (Mezirow, 2000, p. 8). Thus, scrutinizing disorienting dilemmas and habitual assumptions through critical reflection can lead one to develop alternative perspectives or new ways of thinking and acting.

Kate developed a new meaning perspective and, by finding her voice in the college learning experience, is no longer afraid to participate in class:

*It's really different. I mean, when I started college back in the eighties, I just basically tried to stay in the background, let the younger kids answer the questions. Only if I got called on would I actually talk. I just wanted to get through it. And now, I'm speaking up. You know, saying how I feel about things and not worrying about if I'm gonna look stupid.*

Bill indicated how critical reflection resulted in his acquiring a different perspective of our nation's economic well-being:

*I don't think I'm as naive as I used to be. I'm really starting to drill down and read articles. Sometimes you think the world is this way and that way is pretty good. Then you look at the numbers demographically and economically, and you see reality. It's not pessimistic but, it's like things aren't necessarily what I thought they were. I'm just saying in a very real way, I just see the picture.*

### *Step 4—Integrating New Perspectives into Action and Attitudes*

Learning new meaning perspectives often results in changed actions which are seen by both self and others. In Mezirow's words, "*Learning is understood as the process of using a prior interpretation to construe a new or revised interpretation of the meaning of one's experience as a guide to future action*" (Mezirow, 2000, p. 5). In this study, Marge's new perspective on world geography impacted her course selection behavior:

*That economic geography class made me really see that, God, it's a complicated place. That class was a real eye-opener. Why is it that people in Africa have it so rough compared to Americans? I want to understand that. So I've decided to take a class about Africa that really gets into depth about Africa, third-world country, what's going on there, why are they so disadvantaged compared to us.*

Her new perspective of self enabled her to advocate (to her nonsupportive spouse) for her right to return to college. She said, "*I found my voice, my inner voice maybe, and I relayed that to him. He finally said, okay, I'm not going to fight you on this, so I got things worked and I just put myself out there.*" Neal described the new perspective he has acquired when dealing with hardships of job loss and family addiction:

*The best thing I have ever done is to stop thinking hardships in life are a negative thing. Some of my greatest personal growth has been when persevering through hardship. It not only has made me stronger but gives me greater appreciation for the good things in my life.*

Bobby's words summarize the potency of experiencing college as a transformative learning process which leads to action:

*I guess the best way to say it is that, in my younger days I just felt like other people were living their lives . . . they were in the game, and I was on the bench. And my life now is that I'm in the game instead of on the bench watching everybody else living their life. I'm living my own.*

#### *Evidence of Transformative Learning*

Upon examining the collective evidence of participants' transformative learning, as



reflected in Table 5.1, a few trends come to light. First, to varying degrees, all participants seemed to experience transformative learning in that they: (a) experienced a disorienting dilemma prior to BGS enrollment, (b) exhibited critical reflection on their assumptions, (c) developed new meaning perspectives, and (d) integrated new perspectives into their actions and attitudes.

In addition to the disorienting dilemmas triggering their return to college, OBB students also had to cope with varying levels of personal adversity while they moved through their college experience. Stress levels, as expressed by participants, seemed to be indicative of the academic failure risk factors often experienced by nontraditional students (Levin, as cited in Lumina, 2007). Levin's risk factors, similar to liabilities in Schlossberg's transition model, include having: financial aid need, first generational student status, re-entry status, part-time student status, lack of family or employer support for school, or serious illness.

In accord with Schlossberg's transition model, stress is experienced if liabilities are greater than assets such as employer and family support for school, abundant financial resources, and assistance within adult learner programs. It appears that those who spoke of experiencing high levels of personal life adversity may also have a greater tendency toward experiencing college learning as transformative. Could this be because personal adversity typically results in critical reflection on the meaning of the difficulty and may have predisposed students to transformative learning in other life experiences, such as returning to college? Perhaps those participants who experience the college transition to be most stressful might need to be very intentional about persevering and, therefore, become most

cognizant about the impact of their college experience. Further research is needed to explore these questions.

While the majority of students in this study experienced moderate to high transformative learning, it is important to note characteristics of those students who indicated only limited transformative learning. Two participants were at the beginning of the BGS program and, perhaps, had not yet had enough time since their return to college to experience such transformation as an OBB student. The other participant, a recent BGS graduate, did not seem to be seeking emancipatory, transformative learning. Instead, he primarily expected college to offer only subject-based, objective learning. Perhaps for these students the college-going experience may have been minimized to a task that had been undone and was left to get out of the way as quickly as possible. All mentioned having a high sense of urgency to complete the degree and pursue graduate school or different employment.

### Discussion

This study is limited in that it focused on the experience of nine college students, between 50 and 62 years of age, pursuing Bachelor in General Studies degrees at a public four-year higher education institution. Despite these limitations, the findings inform adult education practitioners about the learning characteristics of Older Boomer students and their capacity not only for cognitive changes but for learning that is transformative.

One could argue that transformative learning is imperative to prepare adult learners for their roles as citizens, parents, and productive workers in the rapidly changing, pluralistic, globalized twenty-first century. Mezirow believes this is the very crux of adult education—to “empower the individual to think as an autonomous agent in a collaborative

context rather than to uncritically act on the received ideas and judgments of others”

(Mezirow, 1997, p. 8). Bobby is a prime example:

*I believe in myself. A lot of people I know, I used to trust them to make the right decision. Any more, it doesn't hurt as many people if I trust (myself) to make decisions, whether it's work or outside of work. I just trust my own judgment. I would rather trust myself and be wrong than to trust them (others) and be wrong, because I'm not even giving myself a shot at being right when I'm trusting them.*

While the experience of transformative learning cannot simply be prescribed by either learner or educator, understanding its process can enable one to be more open to the potential of learning that is indeed transformative. So, if one cannot directly teach transformation, how does one foster the optimal conditions for its potential? Adults are expected to understand themselves, their choices and to act as autonomous agents in constructing the meaning in their lives. However, even Mezirow (2000) contends that:

Learning theory must recognize the crucial role of supportive relationships and a supportive environment in making possible a more confident, assured sense of personal efficacy, of having a self more capable of becoming critically reflective of one's habitual and sometimes cherished assumptions, and of having the self-confidence to take action on reflective insights. (p. 25)

Particularly in adult education then, there is a need for educators to support transformative learning through caring relationships (Cranton, 1994; King & Lawler, 1998; Palmer, 2007; Silverman & Casazza, 2000). Several qualities and actions are necessary for that support to occur. First, educators should strive to be authentic. Second, educators can be supportive of learners by fostering group interaction and by encouraging learners to establish learner networks. Learner networks are defined as “any sustained relationships among fellow learners either within a formal setting as a course or an information setting such as a self-help group” (Cranton, 1994, p. 196). Third, while empowering learners,

educators are often put in a position to respectfully challenge learners to be critically reflective of themselves.

Educators play an important mentoring role in the classroom by both supporting greater levels of awareness and challenging students to think critically toward transformative learning. “Most students are unaware of their agential reach into their own lives. Mentoring can help students transition from consumerist, informational learning to self-authoring, transformational learning” (Parks, 2007). This type of mentoring certainly follows the spirit of the origins of adult education.

Faculty must help students make healthy adaptations and solid choices for action without being prescriptive. According to Cranton (2002):

there are no special methods to guarantee transformation. . . . In every strategy we use, we need to provide an ever-changing balance of challenge, support and learner empowerment. . . . In the end it is the student who chooses to transform. (p. 71)

### Conclusions and Recommendations

This study examined the learning experiences of OBB college students and the influence on their cognitive development and personal transformation. Several persistent themes surfaced concerning Older Baby Boomer students’ college learning experience. First, OBB students have high learning expectations of their college academic experience. Second, OBB students use positive coping strategies to manage their college learning experience which then yield expanded cognitive capacities. Finally, most OBB students experience college as a transformative learning process which enables adults to realize their

potential for becoming more liberated, socially responsible, and autonomous learners (Mezirow, 1997).

These findings support conclusions of earlier research done on adult learning characteristics and coping strategies (Graham & Donaldson, 1999; Kasworm, 2003; Lumina Foundation for Education, 2007; Schlossberg, 2006). The college learning experience for older adult learners in this study resulted in newly expanded cognitive capacities beyond those which may have been acquired formerly. Thus, this study elaborates on typical adult developmental stage theories in that adult transformational learning is not assumed to be automatically experienced through the maturation process alone. Instead, educators' attempts to foster critical reflection in a social environment are critical to adult transformational learning.

Implicit in these findings are three specific suggestions for fostering the transformative learning process for older adult college students. First, providing opportunities for faculty professional development is crucial to acquiring teaching expertise, including learning how to foster transformative learning in adults. Several students bring up the problem that some college faculty do not seem to know how to teach; they are described as not using experiential learning techniques, but rather just reading from a book. Is this a ramification of emphasizing research and publication to the detriment of teaching? The increased presence of adult learners may put more pressure on higher education institutions to do a better job with educating their faculty about how to teach . . . not simply having knowledge in their subject area. The required balance of teaching, research, and publication may need to be reexamined to ensure that teaching priorities adequately fit students' needs.

Secondly, faculty must acknowledge the importance of all learning, not just that exclusive to higher education institutions. Adults' life experiences, job experiences, and continuing professional education should be honored in the college arena via increased experiential learning, credit for work experience, and opportunities to share life experience in classrooms and through informal learner networks. These measures provide students the opportunity to link their personal experiences to the learning environment. Increased social interaction could encourage critical reflection through discourse—the very thing needed to foster transformative learning.

Third, policies are needed to address issues of academic quality for older adult education programs. Continuing education programs within higher education institutions must cease to be viewed as merely an add-on activity which exists outside the scope and mission of the organization (Peterson & Masunaga, 1998). Instead, the growing presence of older adult learners in higher education institutions should be aptly acknowledged. In particular, OBB students seeking to navigate new post-retirement career options will require innovative partnerships which provide flexible college credit programs along with life planning support services.

#### Final Thoughts

OBB students transition successfully through college through dedication and positive coping strategies to overcome learning difficulties. Their success is also contingent upon adult educators' willingness to embrace their “need to understand their experience through critical discourse, and with the optimal conditions to do so freely and fully” (Mezirow, 2000, p. 26). The words of one participant summarize the potential positive impact higher education institutions can have on the lives of older adult students:

*Prior to returning to school the vast majority of my actions were directed to providing for family, taking care of family, responsibilities of father and husband. Employment wasn't necessarily based on a quest for personal fulfillment, but rather as an instrument to best provide for myself and for my family. Today, I see myself as being on a journey to a more complete person in that my choices are directed in a different manner. I am making choices that are desire-driven as opposed to necessity-driven. What a flat line life if you can't do that!*

Inviting adults to experience college learning as transformative is one means of helping them move from “flat line lives” to lives with greater meaning and purpose.

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## **CHAPTER 6. OLDER BABY BOOMERS' VOCATIONAL ASPIRATIONS: THEIR SPIRITUAL QUEST FOR MEANING AND PURPOSE**

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### Abstract

Does spiritual development influence older adults' college-going experience and future vocational plans? This phenomenological study explores the experiences of nine Older Baby Boomer (OBB) students (ages 50–62) who are seeking Bachelor of General Studies (BGS) degrees at a Midwestern university. Situated within the framework of Schlossberg's transition model and the construct of spiritual quest, this article highlights findings from individual semi-structured interviews and reflection questionnaires which suggest that OBB students: (a) value spirituality more than religion, (b) use spirituality to make meaning of self and others; and (c) base future vocational choices on spiritual considerations. As they transition out of higher education, many OBB students plan to delay retirement to pursue more meaningful, generative work through encore service careers. The spiritual inclinations of older adult students have implications for both employers and adult educators.

### Introduction

With the onset of a new postmodern century, these past two decades have seen an increased emphasis on spiritual matters emerge from the secular community (Ellingson, 2001; Kuh, & Gonyea, 2006; Nino, 1997; Wink & Dillion, 2002). According to the AARP *Survey on Life Long Learning*, more than 9 of 10 adults (age 50 and older) are interested in learning for their own spiritual or personal growth (Swank, Hollenbeck, Keenan, & Fisher,

2000, p. 15). Roof (1993) attributes the recent surge of public interest in spirituality to members of the Baby Boom generation, born between 1946 and 1964, and their quest for personal meaning outside the confines of organized religion. Older Baby Boomers (defined by the author as those between the ages of 50–62 at the time of this study) came of age in the period following the social and cultural changes of the 1960s. During that time, American society experienced key changes in religion from an emphasis on community and institution to an emphasis on personal and individual growth.

Around midlife—the age of Baby Boomers today—meaning and purpose become central concerns, and individuals typically begin to turn inward to explore their inner values and spiritual selves (Schlossberg, Waters, & Goodman, 2006). Thus, adult development centers on the notion of spiritual growth as a positive outcome of normal maturation (Nino, 1997). According to Fowler, adults in midlife and beyond tend to have a conjunctive faith and desire to reconcile the untransformed world with their personal vision and loyalties (1981). They are moving beyond the linear and logical modes of comprehending reality to a newly evolved way of “viewing the world [that] embraces the notion of paradox and incorporates feelings and context as well as logic and reason in making judgments, a turn that is conducive to spiritual quest and yearnings” (Wink & Dillon, 2002, p. 80).

Spiritual quest is known as the existential engagement that emphasizes individual purpose and meaning-making within one’s life and work (Klaassen & McDonald, 2002; Lindholm, Goldberg, & Calderone, 2006; Vella, 2000; Zinn, 1997). The primary task of the spiritual quest is generativity, “a fundamental engagement that enables the individual to construct an enduring narrative in an historical context, despite the inevitable impermanence

of self and others” (Nino, 1997, p. 10). Seeking one’s spiritual quest aims to answer the fundamental questions of “Who am I?” and “What is my purpose?”

Several adult educators perceive meaning-making in adult learning as related to the spiritual quest (Dirkx, 1997; English, 2005; Tolliver & Tisdell, 2006). Yet, until recently, research about college student spirituality has largely been absent from higher education discourse (Lindholm et al., 2006; Tisdell, 2001, 2007). The public academy has historically disdained the realm of religion and spirituality, viewing this realm’s worthiness as less than the rational pursuit of empirical knowledge (Astin, 2004; Chickering, Dalton, & Stamm, 2006; Rendón, 2000). Despite these realities, the interest in spirituality is rapidly gaining momentum in higher education among traditional age and adult students (Dalton, Eberhardt, Bracken, & Echols, 2006; English & Gillen, 2000; Higher Education Research Institute [HERI], 2005; Kuh, & Gonyea, 2006).

Many educators insist that spirituality is central to the vocation of higher education (Astin, 2004; Kuh & Gonyea, 2006; Palmer, 2007; Parks, 2007) and that the spiritual development of adult students is connected to their learning goals (Kroth & Boverie, 2000).

Tisdell captures this importance eloquently:

Spirituality is one of the ways people construct knowledge and meaning. It works in consort with the affective, the rational or cognitive, and the unconscious and symbolic domains. To ignore it, particularly in how it relates to teaching for personal and social transformation, is to ignore an important aspect of human experience and avenue of learning and meaning-making. This is why spirituality is important to the work of adult learning. (2001, p. 5)

Meaning-making is a central theme throughout adulthood and can be defined as an active reasoning process which requires an individual to formulate questions and answers of his or her own and, thus, requires an introspective capacity to see and search beyond the material

aspects and the impermanence of things in life (Nino, 1997). Meaning-making leads one beyond egocentric perspectives toward higher states of consciousness toward a transcendent or “world-centric” sense of self (Parks, 2007).

Spirituality is not only important to adult learning but also to the adult learner’s vocational aspirations. Older adults are redefining the meaning of retirement (Peterson & Masunaga, 1998; Shultz, 2001; Stein, 2000). Nearly four out of five Baby Boomers desire to continue working beyond typical retirement age, and most will require upgraded skills and credentials (Freedman, 2005b). A national study done by the Lumina Foundation for Education found that most adult learners intend to work beyond the age of 65 and “were repositioning themselves to use their postsecondary training in the labor market for many years” (Pusser, Breneman, Gansneder, Kohl, Levin, Miliam et al., 2007, p. 9). They “are reaching deep within in hopes to make a meaningful societal contribution through social-purpose encore careers” (Freedman, 2006, p. 44). An encore career is defined as:

A 10- or 15-year career moving from midlife priorities to greater significance. Encore careers are not bridge jobs or senior volunteering, phased retirement or any kind of retirement. They are paid positions in social change and community service that promise to make the best and highest use of people's passions, talents and experience. (Freedman, 2006, p. 44)

As the expansive Baby Boom generation makes greater demands on higher education to prepare for re-careering, it is important to examine what is personally meaningful to them. Understanding their spiritual characteristics and knowing how their educational and vocational aspirations are influenced by spiritual inclinations are central to this study.

### Background of Study

The dominant paradigm of studying adult higher education aspirations and spirituality in higher education has been quantitative in nature. The recent surge of studies

about the spiritual development in college students has also been quantitative and focuses primarily on traditional aged students ages 18–24 (Dalton, Chen, & Eberhardt, 2006; HERI, 2005; Kuh & Gonyea, 2006). As suggested by Klaassen and McDonald, “the most important direction for future research in this area is to incorporate qualitative research strategies . . . the richness of quest and existential search calls for the sensitivity of qualitative methods to do it justice” (2002, p. 199). Thus, this study addresses qualitative research gaps in the higher education literature pertaining to adults’ spiritual development and its influence on vocational aspirations.

This study was one portion of a larger, phenomenological study that examined the experiences of degree-seeking OBB learners to understand how psychosocial, cognitive, and spiritual dimensions of adult development influenced both their transformative learning experiences in higher education and their future vocational aspirations. The primary objective of the study reported in this article was to explore how OBB students define and understand spirituality and to examine how spiritual development influences their educational and vocational aspirations.

#### Research Design and Analysis

This phenomenological study was framed within the epistemology of constructivism and utilized an interpretive theoretical perspective. As typical in an interpretive research process (Seidman, 1998), primary data collection methods consisted of semi-structured individual interviews which were audio taped and transcribed verbatim. Secondary data collection consisted of one open-statement reflection questionnaire based upon Nino’s spiritual quest assessment (1997) and an archival data review of the degree requirements of the program in which students were enrolled.

A purposeful sampling strategy was used to select participants between the ages of 50 and 62 who were currently enrolled in (or had recently graduated from) the Bachelor of General Studies (BGS) degree program at a Midwestern university. Ten volunteer participants were recruited through letters, although one terminated prematurely due to her husband's death.

Data were systematically analyzed by first listening to each interview and reading all transcripts to get a holistic sense of the data. Next, data were dissected into the smallest units of meaning to discover any significant statements of reality from the participants' perspectives. Then, data were pieced back together inductively in new ways to produce meaningful interpretations. Finally, themes of meanings emerged from the data analyses, and an exhaustive description of the phenomenon was created (Bogdan & Biklen, 2003; Creswell, 2003; Esterberg, 2001).

Multiple strategies were utilized to validate the findings including triangulation of data, presenting negative or discrepant information, retaining access to participants for continued member-checking, and utilizing both a peer reviewer and an external auditor to develop "intersubjective consensus" (Creswell, 2003). Relevant literature was examined to then determine if the thematic trends and patterns found in the data were supported.

#### Theoretical Framework

This study is framed within Schlossberg's transition model and the construct of spiritual quest, a "fundamental engagement that enables the individual to construct an enduring narrative in an historical context, despite the inevitable impermanence of self and others (Nino, 1997, p. 203).

### *Schlossberg's Transition Model*

Nancy Schlossberg's transition model provides a theoretical framework in which to examine the college-going experience of OBB students. Schlossberg defines transition as "A process over time that includes phases of assimilation and continuous appraisal as people move in, through, and out of it" (Schlossberg et al., 2006, p. 53). Since OBB students in this study were asked to contemplate their post-degree plans, the focus was on their "moving out" from higher education toward future vocational and retirement aspirations.

The anxiety of leaving familiar ways of functioning within higher education and the ambivalence of future plans can cause disequilibrium. Central to Schlossberg's model are four factors that influence a person's ability to successfully cope with unsettling changes: situation, self, support, and strategies. In this study, the importance of participants' sense of self is reflected in the spiritual dimension of human development. Spirituality is a way of constructing meaning in one's life. Meaning-making is a central "self" issue related to internal transitions, and a positive sense of self helps one deal successfully with the "leaving, grieving, and striving" inherent in the moving out phase (Schlossberg et al., 2006, p. 50). Many midlife transitions are accommodated by a need to make meaning of the transition and of life itself. Often in midlife there's a "recommitment to spirituality, defined more broadly than when the adult was younger. . . . a belief in a higher power; hope and optimism; worship, prayer and meditation; purpose in life; love; and moral values (p. 101).

### *Spiritual Quest*

In addition to Schlossberg's transition model, the construct of one's spiritual quest is central to this study. Nino (1997) suggests that spiritual quest is not related to religiosity but is a subjective, exploratory experience of a "person's formulation, negotiation, and



resolution of spiritual concerns that emerge from a common ground of normal experience. The underlying activity is not a transitional state of doubt or conflict, but a striving that extends over the life cycle” (p. 198). In other words, the spiritual quest is applicable to all adults who grapple with existential questions of “Who am I?” and “What’s my purpose?” regardless of their religious beliefs.

### Findings

Persistent patterns induced from the data centered on OBB students’ spiritual development and their planned transitions out of higher education. Data indicate that OBB students: (a) place a greater emphasis on spirituality than on religion; (b) experience spirituality as a way of meaning-making through a spiritual quest that emphasizes individual purpose and meaning; and (c) make future vocational choices based on spiritual considerations, often delaying retirement plans to pursue more meaningful, generative work of service to others through encore careers. These findings are summarized in Table 6.1.

#### *OBB Students’ Understanding of Spirituality*

Because Baby Boomers were raised in a time of material excess, they developed great expectations from life. Today, Boomers look to spirituality to fill a relational void and to answer ultimate questions about meaning and purpose in life. Spirituality is multifaceted and can be defined as a social change perspective, an awareness of something greater than ourselves, a sense of interconnectedness with others, and a sense of purpose and meaning in one’s life (Brennan, 2002; English, 2005; Lindholm et al., 2006; Tisdell, 2007). Religion, on the other hand, pertains to abiding by a set of beliefs, rituals, and practices associated with a particular creed, denomination or sect. Religion may be an outward expression of the inner

Table 6.1

*Findings Summary*

OBB Participants	Marge	Kate	Rita	Alice	Paul	Bill	Leonard	Bobby	Neal
<b>UNDERSTANDING OF SPIRITUALITY</b>									
<b>OBB students tend to place a greater emphasis on spirituality than on religion</b>									
Childhood religious upbringing	Baptist	Catholic	Catholic	Catholic	Catholic	Born Again Christian	Catholic	Catholic	Catholic
Current adult religious practice	N	Limited	N	Regular	Limited	Regular	Regular	N	Regular
Sacred is best found in religious symbols	N	Y	N	N	N	N	N	N	N
Spiritual beliefs are separate from and/or greater than religion	Y	Y	Y	Y	Y	N	Y	Y	Y
Spiritual beliefs are more important than religious traditions and practices	Y	Y	Y	N	Y	N	Y	Y	Y
<b>OBB STUDENTS' SPIRITUAL DEVELOPMENT</b>									
<b>Spirituality is a way of meaning-making as reflected in the construct of spiritual quest</b>									
Inwardness - Discernment within self	Y	Y	Y	Y	N	Y	Y	Y	Y
Relatedness with Ultimate Other – Belief in God/Higher Power	Y	Y	Y	Y	Y	Y	Y	Y	Y
Relatedness with others – Connection to others for greater good	Y	Y	N	Y	Y	N	Y	Y	Y
Generativity for helping others – Spirituality is an applied action	Y	Y	Y	Y	Y	Y	Y	Y	Y
<b>RELATIONSHIP BETWEEN SPIRITUALITY AND FUTURE VOCATIONAL ASPIRATIONS</b>									
<b>Spirituality does impact the future vocational aspirations of OBB students</b>									
Spirituality directly influenced decision to return as adult student	N	N	Y	N	N	N	N	Y	Y
Plans to work beyond “retirement”	Y - PTE	Y	Y PTE	Y	Y	Y	Y	N	Y - PTE
Spirituality impacts job choice	Y	N	Y	Y	N	N	Y	N	Y
Spirituality impacts how one works	Y	Y	Y	Y	Y	Y	Y	Y	Y
Desires Encore Career	Y	N	Y	N	Y	N	Y	N	Y

spiritual life; one, however, can be spiritual without being religious, and not all who claim to be religious are sensitized to the inner life of spirituality (Tisdell, 2001, 2007).

### *Defining Spirituality vs. Religion*

As to be expected of members of this generation, OBB students in this study placed a greater emphasis on spirituality than religion. All OBB participants in this study were raised within Christian religious traditions; many, however, do not regularly participate in religious practices as adults. This does not indicate a lack of spiritual belief, as expressed by Marge, who said, *“I struggle with religion, because I’ve seen too many wars over religion. But it’s not that I don’t believe in a higher being.”* Likewise, Kate said, *“I don’t go to church, but I believe in God.”*

OBB participants see spiritual beliefs as different from and not exclusively or necessarily contingent upon religious traditions or practices such as church attendance. Kate said, *“I just don’t always seem to feel that you have to go to a structure and pray. You can talk to Him anytime you want. I consider the world my church.”* Paul agreed, *“Spirituality to me goes beyond the confines of the church. It’s just having a belief in something greater than we are, not being focused on ourselves.”* Neal’s understanding of spirituality captured the essence of how most participants distinguished spirituality from religion, *“I understand spirituality as associated with religion, in that my spirituality incorporates God or a Higher Power, but separate from religion because it is not selective, not stored in a building, nor does it require rituals or distinguishing clothing.”*

### *Value of Spirituality*

Typical of their generation, OBB students not only defined spirituality as different from religion but often understood it as greater than religion. OBB participants placed a

greater value on spiritual beliefs than religious traditions and practices. Bobby summarized it this way,

*I think religion is like more of a man-made thing and spiritual is more of a divine thing. They're connected to a certain point but not totally. There's a lot more to it than the religious practices. I think it comes down to applying those religious practices in other areas. I mean, they don't just stop when church gets done.*

Similarly, Leonard said, *religion is nothing but a bunch of laws that man has set down to try and please who they think is their God. Spirituality is the inner workings of the person—the soul is another way of saying it.*

#### *Sacred Symbols and Images*

Although most acknowledged that sacred symbols and images can be religious, OBB students did not perceive sacred as primarily found within a church or traditional religious symbols and images. Leonard, for example, believed that *“Sacred images or symbols for me are not really important. The church is just a building where people meet. It's how you interpret the teachings that make you what you are.”* Similarly, Marge felt that, *“God is not in the buildings. He's out on the street. He's on my face. He's on your face. He's on everybody's face.”* Bill said, *“I really cannot say I have any particular images or symbols that are sacred to me. I do not see it in any tangible objects of adoration.”* Sacredness was often believed to be in nature, people, and animals. Neal said,

*My strongest concept of spirituality is found in nature . . . The majesty of it all, from the complex colors of a pheasant or turkey to the grace of a deer running through high grass is awe inspiring to me. Man can put together the components to make a car but in no way can they create a leaf. These types of things inspire my spirituality and prove to me that there is an entity greater than us.*

*Meaning Making Through Spiritual Quest Activities*

In this study adult spiritual development was reflected in three spiritual quest activities that were central to participants' meaning-making process: (a) turning inward, their interior sense of self; (b) relating to others, including relatedness to both God and their connection to the human community; and (c) generativity for meaning and purpose (Nino, 1997).

*Inwardness—Self Interiority*

According to Joann Conn, author of numerous books on spiritual maturity, turning in from the world to become self aware is the primary root of spiritual discernment (personal communication, April 8, 2008). Howell (as cited in Schlossberg et al., 2006) supports the idea that midlife can be a period of spiritual awakening, “a central influence on quality of life at midlife is an awareness of one’s own values and motives, along with achieving agreement of these unique values with circumstances and behaviors” (Schlossberg et al., p. 101).

Participants in this study indicated that inwardness and self awareness was an important component of their personal spiritual growth. Neal, for example, said,

*I seek direction from my God on a daily basis. Not in a church but in one-on-one discussion. It's important for me, during the day, to keep that connection. I have to reevaluate a lot of things. God wants the best for me, and all I have to do is open my eyes and keep being aware of what those things are.*

Rita described her interior discernment in this way,

*You communicate with God and pray that He is in your daily life and goings on. It is a form of direction that one comes to during hard times or points in life that are a fork in the road, looking where you're at, and really pondering on it, really thinking.*

Often this interior focus within oneself assisted participants in answering the question of “Who am I?” and created a sense of internal cohesiveness. Bill described his spiritual awareness, *“I see it as keeping me centered down. This is a real balance with serving my God and my family while pursuing my own work interests.”*

#### *Relatedness—Belief in Others*

The second spiritual quest activity of meaning-making is relating to others including both relationships with human beings and with an ultimate Other.

*The ultimate Other.* In this study, each participant expressed a belief in a Higher Power/God greater than oneself. Kate said, *“A lot of people forget about God when they’re going through bad times. But, He’s always there.”* Paul said, *“In my opinion there’s something greater than us. Now what that is? I don’t know. I’m not smart enough to understand if there’s a Higher Being. I believe there is.”* Neal said, *“If I can put my spin on spirituality, it’s that there’s a plan in my life. I have a really big belief in a God and that there are avenues being opened for me to be part of that plan.* Even participants with doubts did not deny God’s existence. Marge said, *“I have this philosophy about God. I like to think that there’s a God, that there’s a Higher Being out there, but I question Him sometimes.”*

OBB participants perceived God as a positive life source. Kate said, *“I know He’s a very forgiving God. He’s not vengeful like some people think.”* Leonard said,

*If I had to say what drives me it's my faith in God. He is a friend and companion. Someone I can tell my deepest thoughts and feelings to. Someone I know will listen to all my complaints and sometimes just smile at me as a parent smiles at a child.*

Alice described her understanding of Other, *“For me it’s a Higher Being and how I am part of this whole world and how I can give to make it a better place and feel at peace with*

*myself.*” Belief in the transcendent is also reflected in the general population of older adults. For example, in a recent AARP report, *Thoughts on the Afterlife Among U.S. Adults 50+*, almost all respondents (94%) believe in God (2007).

*Others—the human community.* Our relatedness to other people is important to answering the question, “Who am I?” Being “other-focused” is a common value of OBB students in this study, as indicated by Neal, “*Spirituality, I think, is being not so wrapped up in myself that I can’t observe around me and, be part of other peoples lives. That’s important for me.*” Similarly, Leonard said, “*We all have an innate attachment, not necessarily to each other, but to each other through God. I guess that’s what I would consider my spirituality.*”

Most participants placed a high value on connecting with others in the human community for the greater good. As expressed by Alice, “*We’re all human beings, and we need to nurture and help each other along in this world. We’re all here, and we have a purpose to kind of serve each other for the greater good.*” Bobby said,

*The most important things in life aren’t things, they’re people. So I guess that’s pretty much what makes me tick. It’s that I appreciate the relationships with people. There needs to be a connection to a greater circle of people and a greater being and a higher self for me to feel okay in my own skin. I see it as necessary for me to be healthy. When what makes me go is self-serving and 100 percent all about me, I’m not happy. There needs to be some other purpose going on for the greater good.*

Another participant agreed,

*I absolutely feel connection with humanity and the people around me. That interconnectedness, that oneness, that willingness of theirs to make a sacrifice of themselves showed me that there is a force guiding us to take care of each other.*

Many participants see this connection with humanity in a spiritual sense and emphasized living by the golden rule. Bill, for example, talked of:

*It's a general thing, but living a good life, treating other people with respect, that sort of thing sounds very vague and gooey, but I've kinda seen some of those principles work in life.*

Likewise, Paul expressed a similar belief, *"I think for me, it's simply trying to be a good human being, trying to be a good citizen, treating people the way you want to be treated. I think that's being spiritual."* Leonard took the golden rule one step further,

*They say the golden rule is do unto others as you would have others do unto you. I believe that I live now to do unto others as God would do unto me. In other words, what has He done for me and how can I pass that on to somebody else.*

### *Generativity*

In addition to inwardness and relatedness, being generative is an important activity in seeking one's spiritual quest. Participants in this study expressed generative values through helping others, passing along lessons learned in their higher education experience, and leaving a positive legacy for future generations.

*Generativity by helping others.* All OBB participants expressed that helping others was important to their own spiritual meaning-making. They had an applied understanding of spirituality—an action for making a difference for others. Bobby meant this when he said, *"I think spirituality is more related to doing than learning. I think the learning is a by-product of the doing."* Kate said,

*I feel most alive and most authentic when I am helping someone either solving a problem at work or giving a hand to a family member or friend. I like being able to help, using gifts to help, not hurt.*



Paul believed, *“You help people if they need help. You do it, you don’t expect money. You do it to be doing it cause that’s what you’re supposed to do. It’s the human thing to do.”* Neal stated, *“I believe a meaningful life can only be achieved by having an ‘others’ perspective. That does not mean we sacrifice ourselves, it means we are willing to care for others as well as ourselves.”*

*Passing along a value of education.* One specific avenue for helping others, mentioned by most participants, was a desire to make a difference by encouraging other adults to seek higher education. They recognized that the higher education process had helped in their own personal growth and development and, therefore, expressed gratitude and a desire to pass along this value of education. Paul, like many other participants, mentioned the importance of setting an educational example for his children, *“I was preaching to my children, ‘you’re gonna go to college’. Well, with my wife having her masters and I’m sitting there, you know—one thing I learned in the military, you lead by example.”* Marge expressed a desire to give back,

*I hope I inspire other people that you're never too old to learn something. Maybe I can use all I've learned to help somebody else. I think there's places for people like me, where I might be needed, might be of some use. So as long as I still have this drive within me, this spirit within me to keep doing that, I wanna try, even as a volunteer, to help. Maybe something that's less selfish, that's more doing good in the public life.*

Alice believed that convincing others of the value of life long learning is her way to give back, *“I encourage other people to go back, and when they’re afraid to go back, help in any way possible. That’s a way for me to give back.”* Paul simply stated, *“If you learned, you should teach; if you took, you should give.”* Rita indicated, *“I want to be able to be a*

*possible role model for other women who are trying to achieve their educational goal and with similar situations as myself.” Bobby discussed,*

*Finishing my degree and learning what I’ve learned helps me to pass any sort of knowledge on to somebody else. I would like to take some younger people, and teach them some things that the company needs to have done.*

*Leaving a legacy.* OBB students wish to leave a positive legacy for future generations and derive great meaning and purpose in striving to leave the world a better place. Leonard said,

*The world has to be a better place, because of what I achieved. I think we can all make a positive influence—even if it’s just our little chunk of the world. We have to live our life for a positive outcome. A positive outcome doesn’t mean that you’re rich and famous; it just means that when you are dead and gone somebody says that was a good person just because. . . . That’s the goal that you’re after.*

Paul agreed, *“I think we have a responsibility to participate in the human race and try to make our world a little better. We should help those in need.”* Neal said,

*For me, there’s a lot of pay it back to life. I’ve had my opportunities and so I have the opportunity to give to someone else. My goals are to make a difference for other people. You know, try to leave your footprint here and don’t make it crushing.*

### *Spiritual Influences on Future Vocational Aspirations*

Unlike traditional aged students, OBB students did not expect higher education to play a role in their spiritual development. While most OBB students did not see their personal spirituality as being directly related to their decision to pursue higher education, spirituality was found to be an influential factor in OBB students’ future vocational aspirations.

### *Retirement Plans*

Like most in their generation, OBB students in this study did not have definitive plans for retirement, and most wished to continue working at least part-time well after the traditional retirement age of 65–67. As they contemplated moving out of higher education upon degree completion, most OBB students had future aspirations shaped by a desire to serve others either through volunteerism or encore careers in entirely new career areas. Some may “have already retired, but are still seeking purpose and productivity” (Freedman, 2005a, p. 2). Paul, for example, has already retired once from the military,

*I spent a total of 26 years in. I'd like to just get back in the workforce and work as long as I can. I don't have a set date for when I need to stop working.*

Perhaps they have this desire to work because work provides social as well as financial capital (Moen and Fields, 2002). Remaining engaged in work or volunteerism “often leads persons to feel competent, useful, and, most of all, that they ‘matter’” (Schlossberg et al., 2006, p. 52). When asked about his retirement plans, Bill envisioned staying in the workforce part-time,

*What is retirement? It's not a certain age anymore; it's when you want to leave. If you like what you're doing or you can get out of it and then get into another job after you retire, that has less hours or maybe consulting-type work, then you can keep going, keep your mind busy, and still have time for the kids and the grandkids.*

Some participants could not envision ever ceasing employment. Kate, for example, said,

*I don't know what I would do if I was home everyday. So, as long as my mind's still good, I might as well keep on working. [I just want to make sure] that they use all of me and just don't let me sit there, doing busy work or boring stuff. I don't wanna be a Wal-Mart greeter.*

Marge, who currently works part-time and cannot see herself working full-time after her degree completion, said,

*I think I could do it, but it's not that I really want to do it. I think there's a lot of other things I might rather do. I don't ever see myself being the type of person that's, "Okay, I'm retired now, I'm just gonna be on vacation all the time."*

Leonard is approaching his second retirement and is in college to train for an encore career in counseling. He does not plan to stop working:

*I'm still working and I'm 57 and a half. So, once the house is paid for, I no longer have to work. Then I have no reason, no financial reason, to have to work anymore other than the fact that I don't want to retire.*

Regarding retirement, Alice, who focused on child rearing for years, said, *"I have no plan on it, not for a long time. Maybe it's because I didn't work for so many years. I just have no desire to quit working, not yet. I like the stimulation work gives me."*

### *Meaningful Work*

Regardless of plans for retirement from the workforce, spirituality does impact future vocational aspirations. All participants sought more meaningful, generative work in the future, desiring to make a difference for others. This propensity toward serving others—whether through work or volunteerism—was mentioned as important by every participant. Furthermore, they had reached a point of valuing meaningful work more than individual performance. Bridges (1980, p. 46) contends that, "a growing concern for meaning and a loss of interest in simple performance is evident in many people after midlife." Leonard, for example, is not driven by individual performance any more, nor external measurements of success such as money and recognition. He said, *"There's got to be a reason to do what I'm doing. And it's gotta be a reason that I think is a positive—not positive for somebody's company or someone's bottom line."* Leonard went on to describe in greater detail,

*There would have been a time in my life where I had to be the best, and I had to prove it. That's not what drives me anymore. When I was young and*

*ambitious, my goal was to make myself as good at whatever I was doing at the time. As I got older and more settled, I wasn't driven by that ambition. I don't need to prove it anymore.*

Neal also mentioned a change in his priorities:

*Before as a younger man, I was very driven to excel, to do my best. You know, I remember my wife not going to my softball games because afterwards I'd be in a really bad mood because, you know, I was just expecting a lot of myself. And I don't know if it's maturity or because of some of the things that have happened, but that's not imperative right now.*

Bobby's work values had changed as well:

*What used to make me go was going to work and having my boss believe that I was good. Okay? Now it's going to work and helping our team making my boss's boss think that all of us are good. I mean, being part of something greater.*

Participants also indicated that doing meaningful work was doing work they loved; they would no longer settle for work that was not satisfying. Leonard described it this way, "If you're doing something in this field that you're not really meant to do—you're doing it just to do it—there's no joy in it." Bill simply said, "I'm beginning to see this—what you really enjoy, what you wanna do, to me, is really important."

Doing meaningful, intellectually stimulating work was more important to participants than money. Alice said, "It's not that I feel like I have to dump a lot of money into a retirement, I mean, I like working. I like the stimulation it gives me." Bill also sees the importance of future work that is intellectually fulfilling:

*I'm looking to probably work until I'm seventy. Do I really wanna do that? What I'm doing now, I can. But if I want something that's more, to put it bluntly, intellectual, and in an office where I have more control of things and a nicer salary and things, then I would have to make changes.*

Participants perceived meaningful work as a vehicle to sustaining active, healthy living. Paul, retired from the military and currently working part-time as a trainer, said,

*As long as I'm healthy, I wanna be doing something. I'd rather be doing something that's gonna keep me a little more active. I've done this training bit long enough to know that staying active is very important if you wanna have any kind of longevity.*

Leonard wanted to remain more active than his parents are:

*If you're like the typical factory worker whose life is to do nothing but to get to age 65 where I can start drawing my check, if that's your goal in life, you're gonna have a very sorrowful last part of your life. My parents are that—retired from the factory, he sits in front of his TV set and watches his shows. They don't mean anything cause that's all he does. I guess I don't wanna end up that way. I wanna end up with doing something, even when I'm old, that has a positive effect on somebody.*

Bill had similar concerns about inactivity in retirement:

*I'm a person that does not admire a person just sitting around. That's not the way I wanna end up. I wanna keep my mind busy, be involved in things. . . writing skills, analytical skills, hopefully, even in future retirement, get involved with voluntary organizations.*

#### *Encore Service Careers*

A significant finding of this study is that many OBB students want to pursue entirely new encore careers or volunteerism or at least significantly change their job responsibilities within their current career field. Most who choose encore careers are influenced by spiritual purposes. Those who did not indicate that spirituality directly impacted their choice of WHAT profession to pursue did indicate that spirituality influences HOW one does his/her job (making ethical choices). Either way, spirituality was found to influence OBB vocational aspirations, particularly for those participants seeking encore service careers in such professions as youth counseling, chemical dependency rehabilitation, animal rescue, teaching, and health career advocacy. Leonard, who is about to retire for a second time, said,

*I want to work with people that abuse drugs and alcohol, people that come out of prisons, the halfway houses, those type things, because I just feel those chunk of people is looked down upon by society. I just feel this need to help*

*people get their lives back on track. If I am not in a paid position as a counselor for individuals that are recovering from a life of drug and alcohol abuse, I see myself as a volunteer doing this same type of work.*

Neal, a recent BGS graduate who is pursuing a master's degree in counseling, said,

*I would like to work in family counseling, preferably in child counseling. I want to be able to take my education and life experiences to help others be able to cope with life. I have experiences that can help other people and if I can convey those to them, maybe it can help them down the line. I just enjoy—I get fulfillment out of helping other people.*

Neal went on to describe how his desire for an encore service career might bring greater satisfaction than if he had not lost his job, and, instead, had retired early from his previous company:

*If spirituality is being found in something today that is different from where I found spirituality in the past, I would say it is in helping others. I think that my opportunity to positively influence people is part of my aspirations. Hopefully, I'm able to complete the counseling program and become successful at it as a career. What I see down the road is maybe to be semi-retired. With this career option, I can work another 10 or 12 years and still continue to do this on a part-time basis. My wife and I can do what we want to do—travel around, and yet still have something to come back to, some kind of career to do during those other times. So, maybe this isn't such a bad thing. Before I had an end goal [early retirement] and then was looking at part-time jobs at Home Depot if I needed some extra cash. But now I have a career that I can continue to plug into.*

### Discussion

Findings in this study reveal the importance of spirituality to older adults as they transition out of higher education toward future aspirations of work and/or retirement. For OBB participants, spirituality is an important way of meaning making whereby students discern their purpose and meaning within themselves, within relationships with others, and through generative actions. Coming to know ourselves in the world and making sense of the other within this world are critical aspects of learning (Astin, 2004; Dirkx, 1997; Tisdell,

2007). They are often expressed as a journey. Neal, for example said,

*Today, I see myself as being on a journey to a more complete person in that my choices are directed in a different manner. I am making choices that are desire driven as opposed to necessity driven. As these goals are met and achievements accomplished, getting closer to my quest, I am feeling more complete.*

Spirituality is an important consideration of this journey and a central value used to help OBB decide which future careers to choose and how to approach their work. As a result, the spiritual inclinations of older adult students have implications for both adult education practitioners and employers.

Spirituality is very much in the consciousness of higher education today (Chickering et al., 2006; HERI, 2005; Palmer, 2007; Parks, 2007) and has become an integral and relevant concern in the field of adult education in particular (English, 2005). “Almost all the content areas that typically characterize college and university curricula have potential for helping students address issues of spiritual growth, authenticity, purpose, and meaning” (Chickering et al., 2006, p. 113). Higher education institutions would do well to embrace the spiritual aspirations of students as a critical avenue of educating the whole person. Faculty could enhance student learning experiences by acknowledging the spiritual dimension of adult learning. For example, faculty could intentionally foster transformative learning experiences in which students become aware of spiritual insights by critically reflecting on situations of complicity and complexity. Encouraging students toward self-directed learning and lifelong learning honors their sense of self which is integral to their spiritual development.

Acknowledging the spiritual dimensions of adult learning not only has implications for the classroom but for student affairs as well. Dalton et al. share this rationale:



Because of its historic commitment to holistic educational and personal development, student affairs staff must play a stronger role in advocating the place of spirituality in the academy and in the lives of college students. Serious damage is done to students by tolerating a bifurcated life in the academy which honors the life of the mind while relegating some of the deeper aspects of students' learning and development to the purely private domain. (2006, p. 18)

Love agrees, saying, "We need to recognize the spiritual aspects of everyday life and not just associate spirituality with religious practices" (2001, p. 14). Kegan (1994) describes adult-centered student services as providing a "natural therapy" in which higher education staff join with students on their journey by affirming their sense of self (not simply roles) and focusing on their employment fulfillment (not simply career advancement).

Student development staff could consider the construct of spiritual quest when providing career services for older adult learners. For example, knowing that these students find meaning and purpose in helping others, higher education must respond to their tendencies toward encore service careers. By helping older adult students succeed in their preparation for careers about people, purpose, and community, "colleges will capture a new population of students to serve, will help millions of people find greater significance and purpose in life, and will help sustain America's strong economy" (Zeiss, 2006, p. 40).

Findings from this study have implications for employers as well. Since many OBB students plan to delay full-time retirement to pursue more meaningful, generative work, policies for alternative work and retirement options must become more commonplace, including phased retirement, flexible scheduling, and telecommuting. While the propensity of Baby Boomers to remain in the workforce longer is a welcome solution to employers who desire to retain an educated workforce,

the labor shortages . . . pose urgent questions today to public policy makers:

. . . what must we do to recruit, retain, train and address needs of older workers, whose sheer numbers and experience will make them an invaluable commodity in the workplace? (Montenegro, Fisher, & Remez, 2002, p. 5)

Knowing that between 2000 and 2015, “the highest growth rate in the U.S. workforce will be among workers aged 55 to 64” (Montenegro et al., 2002, p. 5) raises several questions for employers. What degree completion incentives could be offered to create a better educated workforce among older adults? How could employers retain seasoned employees by providing innovative retirement incentives beyond existing 401(k) plans? Both employers and higher education institutions must ask themselves, “What policies could entice those approaching retirement age to remain in the workforce and afford easy access to the additional education and training necessary for successful transition to purposeful meaningful work?”

While this study focused on the individual OBB students’ future aspirations as they transition from a bachelors degree program at a public four-year university, future studies might also focus on the adults’ transition plans after attainment of associate or graduate degrees, as well as bachelor degrees at different types of higher education institutions. Gender differences in OBB’s future vocational aspirations could also be studied. Alternate workforce policies that could provide more innovative, flexible, preretirement opportunities for older adults wishing to integrate meaningful work into their lives well beyond traditional retirement age need to be more fully explored.

### Conclusion

I am struck by the importance OBB students place on spirituality in their lives and by their deep desire to make a difference for others through meaningful, generative work. This aspiration to serve seems to be one value that today’s higher education institutions are

explicitly trying to instill in traditional aged students through curricular and co-curricular programs such as service learning. While recent research about college student spirituality indicates that traditional aged students perceive spiritual realities as an imminent context for developmental growth during their college years (Astin, 2004; Chickering et al., 2006), older adult students appear to already have this spiritual context in place, and they bring that to their higher education experience. If this is the case, perhaps older adult students, who have an enduring value of spirituality coupled with a strong need to serve others, could be catalysts within higher education institutions to focus on students as “citizens of the whole” (Parks, 2007). Thus, older adult students are not only invaluable to employers, who are in need of retaining the talented boomer workforce, but to higher education institutions as well.

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## **CHAPTER 7. GENERAL CONCLUSIONS, IMPLICATIONS, LIMITATIONS, AND RECOMMENDATIONS**

The purpose of this phenomenological study was to explore the experiences of Older Baby Boomers (ages 50–62) seeking Bachelors of General Studies degrees at a Midwestern university to understand how their psychosocial, cognitive, and spiritual development influenced both their transformative learning experiences in college and their future vocational aspirations. More specifically, this research examined adult learner support needs upon entering into higher education, their concerns in managing their personal and academic lives while moving through the college experience, and their vocational aspirations and retirement planning as they anticipated transitioning out of higher education. Specifically, this study focused on the following research questions:

1. What is the experience of OBB pursuing higher education degrees? What past experiences and future aspirations bring them to higher education? Why are they seeking higher education degrees?
2. How do the multi-dimensions of adult development—cognitive, psychosocial, and spiritual—influence older adult students’ transformative learning and meaning-making experiences in higher education? Conversely, how does their college experience influence their personal growth and development?
3. How do OBB view and describe the role of higher education in supporting their continued development and future vocational aspirations?

The answer to these questions will help determine the future development of the adult education field.

Although numerous theories of adult cognitive, psychosocial and spiritual development informed the design of this study, the data were analyzed using Nancy Schlossberg's transition model (psychosocial development), Jack Mezirow's transformational learning theory (cognitive development), and the construct of spiritual quest construct (spiritual development).

### General Conclusions

General research themes which emerged from semi-structured individual interviews and journal reflections included, but were not limited to, the following: older adult learner characteristics and reasons for enrollment; higher education support needs; adult transformative learning; self-identified cognitive, psychosocial, and spiritual development; vocational concerns of meaning, purpose, and service; and spiritual influences on future aspirations. Findings were validated using multiple strategies including: triangulation of data, presenting negative or discrepant information, retaining access to participants for continued member-checking, and utilizing both a peer reviewer and an external auditor to develop intersubjective consensus.

Significant insights about the phenomenon of Older Baby Boomers pursuing higher education degrees provide guidance for the future of adult education. As perceived by the OBB participants in this study, their experience was found to be a self-identified transformative process resulting in improved learner self-efficacy, and acquired within a supportive, adult-friendly higher education environment which enabled students to successfully transition not only toward degree completion and ensuing career enhancements, but toward meaningful vocational aspirations grounded in personal spiritual beliefs.



This description of the phenomena of degree-seeking OBB students is noteworthy and complex and engenders possibilities too numerous to explore in a single study. Therefore, research findings were separated into three chapters: (a) the student experience of OBBs transitioning back into college; (b) the learning experience (and consequential transformation) of OBB students as they move through college; and (c) the students' future aspirations beyond college, including the impact of spirituality on their vocational and retirement plans. Aggregate findings are summarized in Table 7.1.

#### *Older Baby Boomer Students Today*

Who are contemporary OBB students and what support needs do they have when returning to college as older adults? Most OBB college students are first generational college students and experience an information deficit about higher education processes. Degree-seeking older adult students are primarily motivated by career aspirations, not personal enrichment. Many are returning to college due to job loss, need of enhanced credentials for promotion, or to train for a new career altogether.

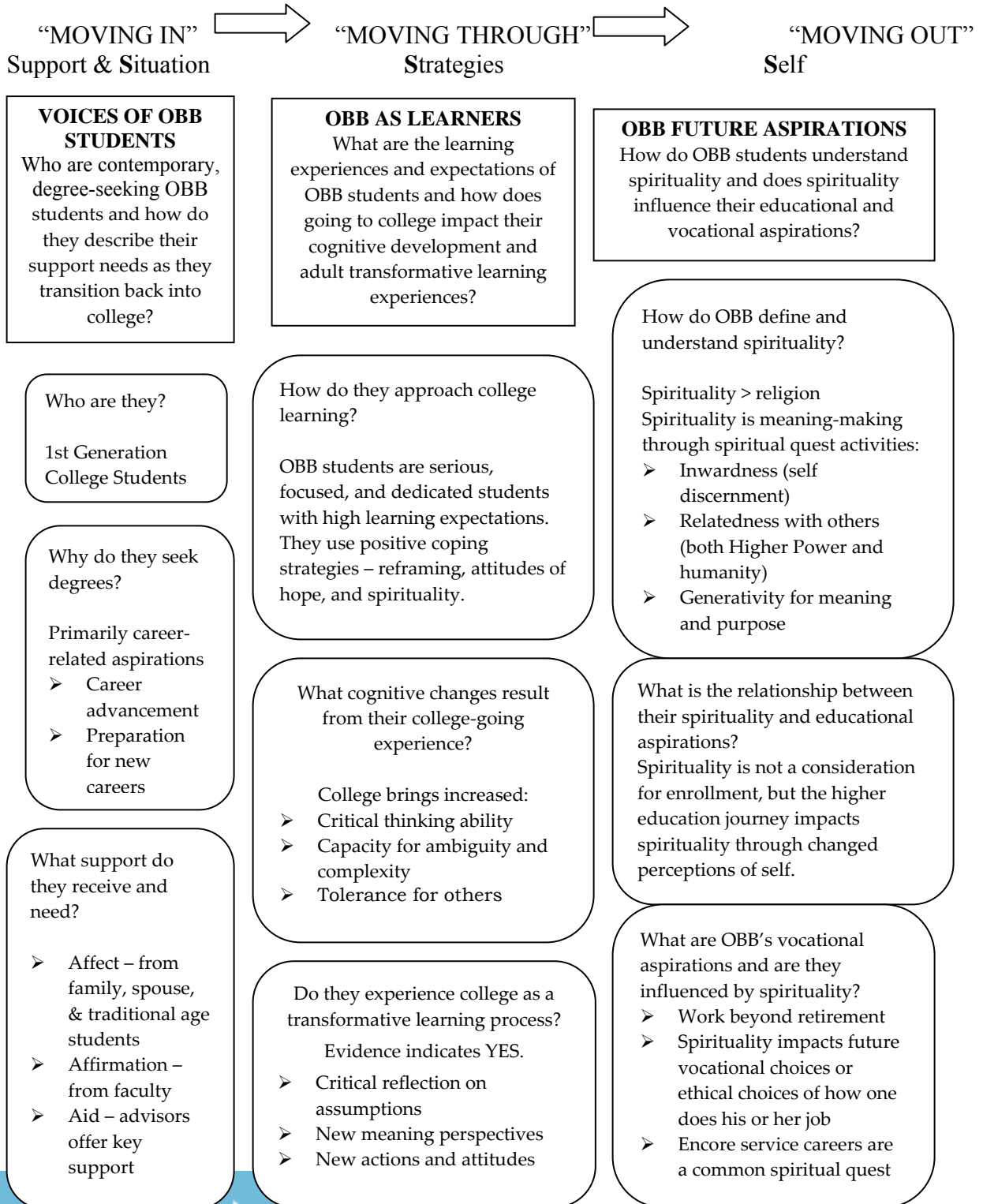
OBB students experience complex support needs while transitioning back into their college endeavors, particularly since many have had experiences of academic failure as traditional aged college students. OBB students sought support through expressions of admiration (affect), agreement or acknowledgement from others or even oneself (affirmation), and assistance in such things as money, time, and entitlements (aid). Advisors, faculty, and family members played important support roles for OBB learners.

#### *Older Baby Boomers' Transformative Learning in College*

How does one describe OBB as learners? Findings reveal important characteristics of persons who will be entering adult programs in the next decade. OBB students are serious

Table 7.1

*Findings Map: Transitions of Older Baby Boomer College Students*



learners, and most have worked to overcome learning doubts, fears, and past regrets. They are dedicated to academic success and practice self-regulation to achieve goals and increase their self-efficacy. OBB students have high learning expectations of both themselves and their instructors. Learning, for example, must be applied, and a social interaction is preferred. Most use positive coping strategies to approach learning, including reframing problematic situations, maintaining an attitude of hope, and using spirituality to transition through stressful situations.

How does college learning impact older adults' cognitive development, and does it result in personal transformation? The college learning experience resulted in increased cognitive capacities which precipitated experiencing college itself as a transformative learning process. OBB students attained an increased ability for critical reflection and discourse, capacity for ambiguity and complexity, and tolerance of others. These cognitive changes resulted in varying degrees of transformative learning. Engaging in the transformative learning process enabled students to experience changed meaning perspectives and the freedom to act on one's own purposes, values, and meanings, rather than relying on those we have assimilated blindly from others. Such vital developmental changes in adults cannot be ignored.

#### *The Spiritual Quests of Older Baby Boomers*

Spiritual development of college students is assuming a more prominent place in secular higher education today. Many adult educators believe that the spiritual dimension of education is important to meaning-making in adult learning. But, how do OBB students define and understand spirituality? Typical of the Baby Boom generation, OBB students

define spirituality as different from religion and tend to place greater value on spirituality than religious practices. OBB students in this study interpret meaning through three spiritual activities that comprise one's spiritual quest—inwardness, relatedness, and generativity. Seeking answers to the fundamental questions of “Who and I? Where do I find meaning? What is my purpose?” is central to student's self identity and meaning-making. These questions brought by older adult student brings to their learning experience provides a challenge to adult educators to go beyond subject-oriented learning.

Does spirituality influence the educational and vocational aspirations of OBB students? Although OBB students, unlike traditional aged students, do not look for higher education to play a role in their spiritual development, they do acknowledge the importance of spirituality in their own daily living. They also acknowledge a spiritual influence in their future vocation aspirations, either on the type of work they choose to pursue or, at the very least, on the way they go about conducting themselves at work. Furthermore, those seeking to delay retirement to serve others through encore careers seem especially cognizant of spiritual influences in their quest for meaning and purpose.

#### Implications for Practice

This study has important implications for student affairs personnel who serve older adult learners seeking college degrees. Institutions of higher learning that seek to be a dynamic force for the future must look closely at implementing program and policy changes to better accommodate nontraditional OBB students. Critical to meeting the needs of older adult learners include strategies, such as: (a) addressing issues of equitable and streamlined access for part-time students; (b) removing financial aid barriers for those who work full-time yet have limited disposable income to spend on educational pursuits; (c) providing

increased flexible course scheduling and expanded on-line course availability; (d) standardizing assessments of prior learning and articulation processes to efficiently allow for work experience credits; and (e) providing student services for adult-specific support needs. In particular, there is a need for career services for those interested in retraining for new encore careers, informal mentoring opportunities through theme-based adult interest groups, and an adult-focused First Year Experience program for first generational learners.

This study also has valuable pedagogical implications to consider. Faculty professional development opportunities are imperative to enable faculty members to know how to employ more transformative learning and teaching strategies, to become comfortable in acknowledging the spiritual dimension of adult learning, and to become adept at revising curriculum requirements to account for adult learners' workplace experiences. To remain relevant and effective with adult learners, college faculty and staff must learn to habitually acknowledge and integrate the importance of all learning, including that beyond formal higher education such as life experiences, continuing professional education, and job experiences. The supportive higher education of the future environment entails honoring alternative modes of student meaning-making aside from cognitive, rational approaches, such as the affect expressed in spirituality.

This study also provides employers with possible directions for policy changes necessary to accommodate the millions of Older Boomers who are redefining the course of retirement. Employers must be proactive in providing innovative opportunities for continued and meaningful employment, such as part-time, flexible schedules and tuition reimbursement for those who wish to complete bachelor degrees or seek advanced degrees. Retirement planning must encompass more than financial planning; life planning is

necessary to Older Baby Boomers who wish to continue employment on their terms.

#### Limitations

The design of this study was limited in that participant recruitment was restricted to those students who were currently enrolled (or who had just graduated the previous term) and who had time and interest enough to participate voluntarily. Findings from this study were also limited in that they inform adult education practitioners and employers about the needs and perspectives of OBB students at this particular Midwestern university only. Results cannot be generalized to OBB students at other institutions. Findings for adult learners of varying ages may be different, as may findings for those students of religious traditions other than Christianity. Finally, the conceptualization, design, and interpretation of this study is situated within the perspectives and past experiences unique to this author.

#### Recommendations for Future Research

Similar qualitative research could be conducted in other locations, at other types of higher education institutions, with students of varying ethnicities, and with OBB students seeking degrees outside of an adult-serving Bachelor of General Studies degree program. It would also be helpful to conduct this research with like groups of students seeking similar career paths to determine if they differ in their higher education support needs, learning experiences, and spiritual quests. For example, further research needs to be done with OBB adult students who are not seeking degrees or primarily motivated to attend because of career aspirations. While this study focuses on the individual learner's development, future phenomenological studies might also focus on the educators who teach adults this age. Further research in workforce development must be conducted by employers to determine viable alternatives for engaging OBB in purposeful and meaningful work beyond typical

retirement age. Ideally, such research could be conducted in concert with higher educational institutions providing educational training for OBB employees.

### Reflections

Any study worth its salt must answer the question “So what?” So what difference does this research make? What are the important lessons to be learned by the participants, by higher education institutions serving adult learners, by employers needing to retain the talent pool of Boomer employees nearing traditional retirement age, and by me, the researcher?

Participants in this study were incredibly generous with their time and willingness to help in research that could make college conditions better for other older adult learners. Most indicated that this was their primary reason for participating. I am inspired by their tenacity to complete a bachelor’s degree despite often experiencing great difficulty and obstacles. I am also humbled by their generative choices for vocational aspirations. Some participants indicated that reviewing their higher education process through the in-depth interviews was a positive learning experience for them and enabled them to reflect on how far they had come. All indicated in various ways that their adult college-going experience resulted in significant and positive changes to how they perceived themselves. Bobby, for example said,

*I always thought I'd put myself in a real bind. I never went to school. I never really did anything until I was like, thirty years old. I looked in the mirror and didn't like what I saw. I carried a lot of shame that I didn't get an education earlier in life. And my school experiences helped me get past that resentment, I guess.*

Thus, for older adult students pursuing college degrees, the lesson learned through this research is one of the redemptive value that higher education can have for adults returning to college.

Adult learners are increasing on campuses today, and, in the case of community colleges, they already are the majority. Critical information can be learned in this research to better accommodate older adult learners in institutions accustomed to educating traditional aged students. Programs serving career-minded OBB students must go beyond the confines of typical senior programs designed primarily for enrichment. Adult-friendly student services will not assume that OBB students know the intricacies of higher education processes simply on the basis of their age. Service-minded OBB students should be viewed as an asset, providing not only enrollment growth, but an impetus for change. In the words of Trachtenberg, “Because Baby Boomers are interested in looking back and assessing their lives, a passion for humanism, often thought to be a casualty of our utilitarian and career-centered age, may well experience a rebirth in some classrooms” (1997, p. B1).

Lessons for employers center on the vocational aspirations of OBB students. OBB desire to keep working and to do work that is intellectually stimulating. They will not be content to stay in current positions for long without flexibility to pursue what is personally meaningful. Life planning and career coaching, along with flexible scheduling options, could be instrumental in retaining the talents of older adult workers into the future. OBB students also expect assistance from employers through tuition assistance. In return, OBB learners are anxious to share their knowledge with younger employees if given adequate opportunities.

As to lessons for me, over these past four years many have asked why I’ve returned to school and why I chose to write a dissertation about Older Baby Boomer students. I have an easier time answering the first question since, like many participants in my study, I was motivated to return for career reasons, needing an advanced degree to seek more senior



positions of higher education administration. To answer the second question, I have to dig a little deeper, to examine my own spiritual quest for meaning and purpose.

I have always had a passion for work, and, consequently, believe strongly in continued personal and professional development. Yet, I have often been troubled by the frequency in which I see people persist in doing work that is not fulfilling for them. Helping people seek, find, and become qualified to do meaningful and purposeful work for themselves and for the benefit of society at large is very important to me. I think that the spiritual quest of individuals too often becomes silenced, rather than liberated, in their sustenance of routine work and the fear of risking advanced education and training. I believe higher education can afford exciting opportunities for individuals of all ages to become qualified to do work that is truly reflective of their desires and fullest potential. Being affirmed in that belief and knowing how to support those older adults returning to college is an important lesson I learned in conducting this research. Conducting this dissertation research has heightened my realization of the vital role higher education plays in the future wellbeing of our county's citizenry, in general, and working adult students, in particular.

**APPENDIX A. LETTER OF INTRODUCTION TO STUDY**

December 15, 2007

BGS Student  
c/o Midwest University  
Division of Continuing Studies

Dear:

Hello. My name is Jane Schaefer, and I am a doctoral student at Iowa State University. Your name was provided to me by Kathy Menke, Assistant Dean for the College of Public Affairs and Community Service. She has informed me that you are currently enrolled in the Bachelor of General Studies Program in the Division of Continuing Studies. In an effort to gather information relevant to my dissertation, I ask you to consider participating in a research study.

The study focuses on degree-seeking students between the ages of 52 and 61, the leading edge of the Baby Boom Generation. We will examine what influences your learning experiences in higher education and discuss your career and retirement aspirations, as well. Specifically, this study will explore (a) why you are seeking a Bachelor of General Studies Degree, (b) the various ways you gain meaning from your college experience, and (c) your view of how higher education institutions can best support your continued development, life transitions, and future aspirations.

I would like to speak to you further about your higher education experience and future plans. Interviews will be conducted with interested students early in the Spring Semester of 2008. I hope you'll consider partaking in this opportunity to advance knowledge about adult learners such as yourself. I will contact you via telephone and/or email in the

next couple of weeks. In the meanwhile, please feel free to contact me directly with any questions.

Jane L. Schaefer, MPA  
Doctoral Candidate, Education Leadership and Policy Studies  
Iowa State University  
(402) 290-3428  
schaef64@iastate.edu

## APPENDIX B. HUMAN SUBJECTS APPROVAL

**IOWA STATE UNIVERSITY**  
OF SCIENCE AND TECHNOLOGY

Institutional Review Board  
Office of Research Assurances  
Vice President for Research  
1138 Pearson Hall  
Ames, Iowa 50011-2207  
515 294-4566  
FAX 515 294-4267

**DATE:** December 20, 2007

**TO:** Jane L. Schaefer  
1405 Harrison St.  
Bellevue, NE 68147

**CC:** Dr. Larry Ebbers  
N226 Lagomarcino

**FROM:** Jan Canny, IRB Administrator  
Office of Research Assurances

**TITLE:** **Older Baby Boomers Seeking College Degrees: Developmental Influences on Educational and Vocational Aspirations**

**IRB ID:** 07-629                      **Study Review Date:** December 20, 2007

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The Institutional Review Board (IRB) Chair has reviewed this project and has declared the study exempt from the requirements of the human subject protections regulations as described in 45 CFR 46.101(b). The IRB determination of exemption means that:

- **You do not need to submit an application for annual continuing review.**
- **You must carry out the research as proposed in the IRB application**, including obtaining and documenting (signed) informed consent if you have stated in your application that you will do so or if required by the IRB.
- **Any modification of this research should be submitted to the IRB on a Continuing Review and/or Modification form, prior to making any changes**, to determine if the project still meets the Federal criteria for exemption. If it is determined that exemption is no longer warranted, then an IRB proposal will need to be submitted and approved before proceeding with data collection.

Please be sure to **use the documents with the IRB approval stamp** in your research.

*Note: As a condition of approval, you must be sure to submit a modification form when the unnamed personnel are identified (i.e., the peer debriefer and external auditor).*

Please note that you must submit all research involving human participants for review by the IRB. **Only the IRB may make the determination of exemption**, even if you conduct a study in the future that is exactly like this study.

## APPENDIX C. FIRST INTERVIEW PROTOCOL

Question guide modified from Esterberg (2002) with content based upon Jack Mezirow's Transformative learning theory (2000) and Schlossberg's Transition Model (2006)

**Introduction:** Prior to asking interview questions, the researcher will describe the background of the study and explain the purpose of this particular interview. The researcher will also remind participants of their rights as research subjects. Namely: a) participation is entirely voluntary and participants can skip any questions they are not comfortable answering; b) precautions that will be taken to keep participant identity and responses confidential; and c) a copy of the interview transcript will be sent to the interviewee for further input and review.

**Study Background:** This study examines the experience of degree-seeking, Older Baby Boomers to see how cognitive, psychosocial, and spiritual development influences their career and retirement aspirations and their learning experience within the context of higher education. Specifically, this study will explore (a) why these students seek higher education degrees, (b) the various ways they construct knowledge and meaning from this experience, and (c) the expectations they have of the role of higher education in supporting their continued development and life transitions.

**First Interview Explanation:** This interview focuses on learning more about your past educational experience and your current experience of seeking a Bachelor of General Studies (BGS) degree. We will explore what brought you to higher education, your experience of being an adult student, and the issues impacting your learning experience.

### Questions about the events related to deciding to seek a BGS degree:

- What past experiences and future aspirations brought you to (value) higher education?
- When and why did you decide to become a student at this university?
- What drew you to deciding to pursue a BGS degree at this point in your life? Personal enrichment, Career advancement, Career re-direction, other?
- What (if anything) about the decision to seek a college degree was stressful? How did you overcome these obstacles?
- Who was involved in your decision to go/return to school?

### Questions about the chronology of your education:

- What was your prior experience of being a student in secondary and/or post secondary education like? How did that experience impact your transition into the BGS program?
- How did your current higher education process begin? Did anything (life events) trigger your going/return to school?

- How do you expect the process to end? How do you see the pursuit of a higher education degree impacting your future?

**Questions about the higher education setting:**

- Tell me the story of your current academic life. What is the experience of you being a student now like for you personally?
- What similarities or differences do you notice between yourself and classmates who are traditional aged college students (18-24)?
- As a student, what are your interests, activities, satisfactions?
- In your opinion, what have been the advantages and disadvantages of pursuing a BGS at this university?

**Questions about the learning process:**

- What expectations, fears, and hopes do you bring to the process of continued education?
- What delivery modes of higher education – such as face-to-face traditional classrooms, on-line or hybrid courses – best meet your learning style and needs?
- What is most meaningful in your experience of the higher education process?
- What are you trying to learn and accomplish? What's the purpose of your work as a student? In what ways do you feel prepared/unprepared?
- How have your studies helped you grow as a person since being enrolled in the BSG program? How has your thinking changed since going (back) to school?
- What strategies work for you to succeed in learning? How do you compensate for any difficulties?

**Questions about future aspirations:**

- What are the key issues that are important to you when seeking higher education?
- What do you hope to gain from this experience?
- What has been your professional work experience? How is your decision to seek this degree related to any past work experiences and future career aspirations?

**Researcher note:** How do they describe what is important? What language do they use?

## APPENDIX D. SECOND INTERVIEW PROTOCOL

Based, in part, on the spiritual factors framework used in the *National Study of College Students' Search for Meaning and Purpose*, conducted by the Higher Education Research Institute (HERI, 2005)

**Introduction:** Prior to asking interview questions, the researcher will describe the background of the study and explain the purpose of this particular interview. The researcher will also remind participants of their rights as research subjects. Namely: a) participation is entirely volunteer and participants can skip any questions they are not comfortable answering; b) precautions that will be taken to keep participant identity and responses confidential; and c) a copy of the interview transcript will be sent to the interviewee for further input and review.

**Study Background:** This study examines the experience of degree-seeking, Older Baby Boomers to see how cognitive, psychosocial, and spiritual development influences their career and retirement aspirations and their learning experience within the context of higher education. Specifically, this study will explore (a) why these students seek higher education degrees, (b) the various ways they construct knowledge and meaning from this experience, and (c) the expectations they have of the role of higher education in supporting their continued development and life transitions.

**Second Interview Explanation:** This interview focuses on learning more about the future aspirations you may have – personal hopes, plans for continued work and/or retirement, etc. --and how your pursuit of a BGS is related to those aspirations. To whatever extent you are comfortable, we will also explore how you find your individual purpose in life and how you make your life meaningful. Actions such as this are often called one's "spiritual quest."

### Second Interview Questions:

#### Clarifying Questions about the Research Process:

- Do you have any questions or comments to make about our first interview discussion? Points of clarification? Concerns? Additional ideas?
- Do you have any questions or comments to make about your journal reflection exercise? Points of clarification? Concerns? Additional ideas?

#### Questions about One's Personal Aspirations and Future Plans:

**Comments:** Religion and spirituality have become one more resource for the development and understanding of self. Seeking one's spiritual quest answers the fundamental questions of "Who and I?" and "What is my purpose?"

- What aspirations do you have for the future? – Personal hopes, continued work, and plans for retirement, etc.

- How does getting your BGS degree relate to those aspirations?
- Have you developed a meaningful philosophy of life? If so, please describe it.
- Where and how do you searching for meaning/purpose in life?
- How do your personal beliefs influence your relationships with others?
- How do your personal beliefs shape your learning goals, in general, and in pursuing the BGS degree specifically?
- Does your spirituality influence your future vocational aspirations? If so, how. If not, why not?
- How has your college experience influenced your personal growth and development?

### Questions Related to Meaning-making (Equanimity)

**Comments:** Equanimity is the ability to frame and reframe meaning under stress. Equanimity means being able to find meaning in times of hardship, feeling at peace, feeling a strong connection with all of humanity (Astin & Keen, 2004). Meaning is perceived in the connectedness of all things and evokes a commitment to the common good (Parks, 2000).

- How do you feel about the direction in which your life is headed?
- For what are you most grateful?
- Do you feel a connection with all humanity, and if so, does that influence your decisions about your future work or retirement plans?
- In this degree program, what are you learning that is meaningful and important to you?
- How can you best share what you have learned in life?

### Questions about One's Personal Experience of Spirituality:

**Comment:** For some, spirituality connotes a relationship with a Higher Presence greater than oneself (Nino, 1997). One's spiritual beliefs can be expressed in practices of religious engagement and/or spiritual habits such as meditation. For others, spirituality simply means finding your individual purpose in life and how you make your life meaningful. Actions such as this are often called one's "spiritual quest."

- Does the statement above, regarding spirituality, fit your understanding of spirituality? Please explain.
- Do you seek out opportunities to grow spiritually and, if so, what does that look like to you personally?
- Do you experience spirituality in your daily life and, if so, how? (E.g. participating in a musical or artistic performance, meditating, witnessing the beauty and harmony of nature, engaging in athletics, etc.)?



- Do you find any spiritual beliefs to be of value, and if so, please give examples of your spiritual beliefs? (Such as, we are all spiritual beings, people can reach a higher spiritual plane of consciousness through meditation or prayer, all life is sacred, etc.)
- Has the person you are today been shaped by experiences of spirituality, and if so, how?

## APPENDIX E. SPIRITUAL QUEST ASSESSMENT INSTRUMENT

Based on Nino's Spiritual Quest Assessment (1997) and on the spiritual factors framework used in the *National Study of College Students' Search for Meaning and Purpose*, (HERI, 2005)

**Instructions:** The purpose of this journal reflection is to provide insight into your ideas about spirituality. Because one's spiritual experience can sometimes be difficult to talk about in dialogue, this exercise provides you with an opportunity to write your reflections after having had private time to collect your thoughts. Type whatever thoughts first come to mind. Let your ideas flow freely. There are no wrong or insignificant answers. Please be as thorough as possible in describing the details of your thoughts. Capturing concepts which are most meaningful to you is much more important than ensuring perfect grammar, spelling, etc. All of your responses will be held in confidence. We'll have a chance to dialogue more about these topics in our next interview.

Before reflecting and writing on the sentences below, it is helpful to first explain what is meant by spirituality. By spiritual we don't necessarily mean having to do with religion, although it could be. Spirituality is viewed as being able to overcome one's immediate circumstances with a sense of interconnectedness with others and a sense of purpose and meaning in one's life. Religion, on the other hand, pertains to abiding by a set of beliefs, rituals, and practices associated with a particular creed, faith denomination or sect. Religion may be an outward expression of the inner spiritual life; however, one can be spiritual without being religious (Brennan, 2002).

### **Before you begin, please note:**

It is very important that you complete the following sentences and questions based upon the current time period and your present experience of pursuing a BGS degree. Please be as thorough as possible – your answers do not need to be limited to single sentences.

Please type your reflections to the following statements:

1. I see myself now...
2. I think that spirituality...
3. My interest in spirituality...
4. To describe spirituality...
5. The people I have met...
6. Thinking about my past...
7. When I feel fragmented...
8. My relation to God...
9. The world around me...
10. To make a difference for others or improve the human condition...
11. A meaningful life...
12. The best thing I have ever done...
13. What I would really like to do in the future...

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Learning is not attained by chance; it must be sought for with ardor and attended to with diligence. – Abigail Adams, 1780

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