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A STUDY OF THE ELDERLY'S ANTICIPATED PARTICIPATION  
IN EDUCATIONAL ACTIVITIES

BY  
ROGER REED

a thesis submitted  
in partial fulfillment of the requirements for the  
degree Doctor of Philosophy, Major in  
Sociology, South Dakota  
State University

1980

A STUDY OF THE ELDERLY'S ANTICIPATED PARTICIPATION  
IN EDUCATIONAL ACTIVITIES

This thesis is approved as a creditable and independent investigation by a candidate for the degree, Doctor of Philosophy, and is accepted as meeting the thesis requirements for this degree. Acceptance of this thesis does not imply that the conclusions reached by the candidate are necessarily the conclusions of the major department.

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Thesis Adviser

Date

Head, Rural Sociology Department

Date

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R.A.R.



A STUDY OF THE ELDERLY'S ANTICIPATED  
PARTICIPATION IN EDUCATIONAL ACTIVITIES

Abstract

Roger A. Reed

Under the supervision of Dr. Robert T. Wagner

The main objectives of this study were: (1) to determine the extent to which persons who are fifty through sixty-nine years of age anticipate participating in educational activities; (2) to determine how the conditions under which educational activities are offered would effect the anticipated participation of the elderly, and (3) to ascertain what factors explain anticipated participation in educational activities of the elderly.

The units of analysis were individuals who were at least fifty years of age but no more than seventy years of age on their last birthday and who had permanent residence within thirty-five miles of Dakota State College. A variety of socioeconomic, systemic, and attitudinal variables were used to measure educational roles, continuity maintenance and anticipated participation in educational activities.

In order to determine to what extent respondents anticipate taking educational offerings, the data were aggregated by summing the responses from a Likert scale pertaining to specific courses. It was found that fifteen percent of the respondents would definitely take a class in the future. To ascertain what courses were of most interest to the elderly the responses to each course were tabulated. It was found that seven

courses were selected most frequently and the course selection reflected their social status as an older person.

The conditions under which the respondent would take course offerings were examined by tabulating the responses to several statements regarding institutional conditions of offering a course on a college campus. Generally, the respondents were not looking for special course offerings, given in special places and under differing conditions than the usual college setting.

To ascertain what specific factors explain anticipated participation in educational activities of the elderly, eighteen independent variables were placed in a multiple regression formula with the dependent variable. The results of this investigation found that those respondents who would most anticipated participating in course offerings were characterized by: (1) greater motivation to participate in educational activities; (2) greater participation in educational leisure time activities that are of a sporting nature; (3) greater perception of education as a life-long process; (4) greater organizational participation; (5) greater perception of education as desirable; (6) greater participation in educational leisure time activities; and (7) greater distance of residence from Dakota State College.

Several general conclusions were made from the findings of the study:

1. A large market for educational offerings by Dakota State College to the elderly does not exist when compared to the traditional student population.

2. The elderly who are interested in taking courses are more likely to take courses that relate to their social status as pre-retired or retired person.

3. Five institutional conditions under which courses would be offered created some concern for the elderly. They are: (a) courses offered for a full semester, (b) courses offered in the Winter or (c) Summer, (d) the cost of the course and (e) courses offered on campus.

4. The academic division at Dakota State College best suited to deliver courses for the elderly is Health and Physical Education because this is the division where the elderly selected most of the courses they would take.

5. Elderly persons who currently participate in informal educational and sporting activities will also tend to take courses.

6. The theoretical model using role theory and continuity theory was supported in that seven of the eighteen independent variables explained about sixty-five percent of the variation in the dependent variable.

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## CHAPTER I

### INTRODUCTION

The sociological investigation into the field of social gerontology is a recent development compared to other fields in sociology. It is only since 1940 that the American Gerontological Society was created. However, gerontology over the last few years has proliferated into several sub-fields due to the increase in the number of persons age 65 and over and the recognition on the part of academicians that the field is broad and complex. In an attempt to understand the educational needs and expectations of these elderly, educational gerontology has emerged. Special impetus to the empirical research and study of the aged was generated in part by the 1971 White House Conference on Aging.

According to Robert Atchley<sup>1</sup> three changes in the social structure have occurred that have brought the study of social gerontology to prominence. First, is the change in sheer numbers because of increasing longevity. In 1900, persons 65 and over represented only four per cent of the total population, but by 1970 this same age cohort represented nine and six-tenths per cent. Second, urbanization has generated new interest. Urbanization has its effect in two ways. The young are moving and have moved from the central city to suburbs and from rural areas to the city. This has left the central city and rural places with a large proportion

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<sup>1</sup>Robert Atchley, The Social Forces in Later Life, Belmont, California: Wadsworth Publishing Co., 1971, pp. 9-13.



of the aged. Also urbanization has meant that the extended family has given way to the nuclear family. This has left the aged without the traditional family support system associated with preurbanization.

Third, industrialization has produced the new social status of retired persons. Society through industrialization has released the individual to be "free" but has not developed institutional or structural underpinnings for this new status position.

Society in general has not responded fully to this role void experienced by older Americans that has developed over the last seventy-five years. Basically, the person age 65 and over has been given the status position of retired person, a status that has been ill defined in the past. Some societal institutions, such as education, are attempting to develop role expectations for positions within an institutional context. Such notions as adult continuing education, life long learning, and life-span education are being discussed on many college and university campuses in an effort to define an educational role for the older American population.

Hiemstra,<sup>2</sup> Havighurst<sup>3</sup> and Londoner<sup>4</sup> developed two concepts to express the role of the elderly student. The first concept used to depict

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<sup>2</sup>Roger Hiemstra, "Older Adult Learning: Instrumental and Expressive Categories", Educational Gerontology, 1:227-236, 1976.

<sup>3</sup>Robert Havighurst, "Personality and Patterns of Aging", Gerontologist, 8:20-33, 1968.

<sup>4</sup>C. A. Londoner, "Survival Needs of the Aged", International Journal of Aging and Human Development, 2:113-117, 1971.

the role of the elderly student is instrumental. Here the elderly student is viewed as participating in the educational program to gain knowledge and information for effective mastery of old-age challenges. The second concept is that of the expressive role. Here the elderly person participates in education programs for enjoyment and/or to develop skills in leisure time activities. Some educational institutions, especially those centered on higher education, are attempting to examine and define parameters appropriate to the status position of the older person.

For the state of South Dakota and for higher education the problem arises as to what extent would the elderly in this state participate in educational activities? South Dakota has a sizable proportion of its population sixty-five and over, and the number and proportion of this population is increasing. How many of this population have an interest in participating in educational activities is a question that has not been sufficiently approached by educational institutions in this state.

Dakota State College, a member of the higher education system, has been charged by the Board of Regents to investigate new student populations and new types of programs. To effectively and efficiently serve the older population in its service area, Dakota State College needs to know under what conditions would the older population be interested in taking college sponsored educational activities. A related question is: what are the types, length, and content areas the older person would have as an interest as well as participating in educational activities.

Serving a new student population would also necessitate findings out what barriers may exist in the traditional college setting. Are the

elderly interested in taking regular course offerings or would they be more likely to participate under differing conditions?

#### Statement of the Problem

The above discussion generates some interesting and challenging questions for sociologists. From the sociological perspective the question arises as to the willingness of the elderly to be students. Another problem related to this is to what extent will new cohorts entering this age category be willing to be students.

The general problem for this study is: What is the anticipated participation of the elderly in educational activities sponsored by higher education in South Dakota? The specific problem for this study is to examine the extent to which persons over fifty years of age would participate in education offerings at Dakota State College, and the factors associated with anticipated participation.

In addition to assisting higher education, the findings from this study can provide information to agencies such as Adult Continuing Education and the South Dakota Office on Aging in their attempt to develop educational programs and establish goals for the future. The practical nature of this study will identify the factors associated with anticipated participation in educational activities of the elderly.

Furthermore, this study relates to a critical and rapidly growing population of the state of South Dakota. According to the 1970 U. S. census, the cohort of 65 and above is one of the fastest growing cohorts in this state's population.

Much of the research in gerontology at the present is oriented toward identifying characteristics of those who are presently in the 65 and over cohort. An additional value of this study is that it proposes to examine those persons under the age of sixty-five in order to measure their anticipated participation in educational activities.

### Objectives of the Study

The main objectives of this study are:

1. To determine the extent to which persons who are fifty through sixty-nine years of age anticipate participating in educational activities.
2. To determine how the conditions under which educational activities are offered would effect the anticipated participation of the elderly.
3. To ascertain what factors explain anticipated participation in educational activities of the elderly.

## CHAPTER II

### REVIEW OF LITERATURE

The following discussion will review the literature relevant to this research project. Three main areas of previous research will be presented in an attempt to identify concepts and variables for this research project: preretirement expectations, life satisfaction as it relates to the development of expectations among the elderly, and the educational expectations of the elderly.

#### Preretirement Expectations

This section will review the research concerning preretirement in an effort to identify some of the variables that are associated with changing role expectations as one shifts from worker to retired status. For the purpose of this research project it will be assumed that expectations for individuals and groups are derived from life situations and not necessarily from psychological needs. Throughout this chapter an attempt will be made to illustrate that life situations develop expectations for the elderly within a group context.

A factor that has been researched extensively and previously considered a major contributor to defining expectations for the elderly is the change from worker to retired person. The "work ethic" concept dominated much of this early research in that it was assumed a person's main orientation in life was the occupational role. Friedmann and

Havighurst<sup>1</sup> and Fillenbaum<sup>2</sup> posited that the status associated with the work role was the most important. Furthermore, they held that the loss of a worker role helped the retired person develop a set of expectations based upon the notion that he is no longer useful.

More recent studies, however, have illustrated that job loss or the ending of a career has little effect on life satisfaction after retirement. Willis J. Goudy, Edward Powers, and Patricia Keith,<sup>3</sup> studying 1922 respondents on work satisfaction and retirement, found little support for their hypothesis that greater job satisfaction will be inversely related to retirement satisfaction. They wrote, "Although judicious selection of work and retirement measures yields support for the hypothesis, it could be argued that in general the test of the inverse relationship between work satisfaction and retirement attitude is not upheld."<sup>4</sup>

Glamser<sup>5</sup> studied the association between retirement attitude and commitment to work. He concluded, "Perhaps most significant was the finding of no relationship between attitude toward retirement and commit-

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<sup>1</sup>Quoted from Herman Loether, Problems of Aging, second edition, Belmont, California: Dickenson Publishing Co., Inc., 1975, pp. 89-93.

<sup>2</sup>Gerde Fillenbaum, "The Working Retired", Journal of Gerontology, 1:82-89, 1971.

<sup>3</sup>Willis Goudy, Edward Powers, and Patricia Keith, "Work and Retirement", Journal of Gerontology, 193-198, 1975.

<sup>4</sup>Ibid., p. 195.

<sup>5</sup>Frances Glamser, "Determinants of a Positive Attitude Towards Retirement", Journal of Gerontology, 31:104-107, 1976.

ment to work."<sup>6</sup> Robert Atchley<sup>7</sup> suggested that work role was not an important determinant in retirement satisfaction. He wrote, ". . . retirement has very little psychological effect on the individual."

When occupational status was controlled, a similar conclusion was obtained. Goudy, Powers, and Keith<sup>8</sup> summed up the influence of occupational status and retirement satisfaction in this manner:

Comparison of the correlations for self-employed and for salaried respondents indicates differences generally minor in magnitude. Nor are these differences consistently in the direction hypothesized, namely that more support would be observed among the self-employed than among salaried workers.

Relative to age, income, and sex, Philip Jaslow<sup>9</sup> studied employment, retirement, and morale among older women and found that when controlling for age, income, and health there were not significant differences in level of morale and sentiments about retirement.

Robert Atchley<sup>10</sup> compared retired teachers and phone company employees and concluded: "These findings show in sum that both sexes seriously embrace job success as a life goal and that women are less likely than

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<sup>6</sup>Ibid., p. 107.

<sup>7</sup>Robert Atchley, Social Forces in Later Life, Belmont, California: Wadsworth Publishing Co., 1972, p. 173.

<sup>8</sup>Goudy, Powers, and Keith, op. cit., 1975, p. 195.

<sup>9</sup>Philip Jaslow, "Employment, Retirement and Morale Among Older Women", Journal of Gerontology, 31:212-218, 1976.

<sup>10</sup>Robert Atchley, "Selected Social and Psychological Differences Between Men and Women in Later Life", Journal of Gerontology, 31:204-211, 1976.

men to make a quick adjustment to giving up their jobs."<sup>11</sup> He suggests sex is a factor in willingness to leave a job among women of all ages, incomes, and health conditions.

Often health impairment is thought to occur following retirement, causing some to speculate that loss of good health is caused by loss of worker role. This association has been challenged by Atchley,<sup>12</sup> "Retirement per se apparently has little psychological effect on the individual, . . . nor has it any appreciable effect on health or mortality." However, Field,<sup>13</sup> Jaslow,<sup>14</sup> and Atchley<sup>15</sup> did find a relationship between poor health, physical incapacitation and poor adjustment to retirement.

It would appear that these findings conflict, but what is found through further analysis of the studies reported above is that persons who are poor in health and physically incapacitated retire early. A study conducted by the Social Security Administration<sup>16</sup> on newly entitled workers from 1968 to 1970 supports this conclusion. As Atchley<sup>17</sup> states,

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<sup>11</sup>Ibid., p. 108.

<sup>12</sup>Atchley, op. cit., 1972, p. 173.

<sup>13</sup>Minna Field, The Aged, The Family, and The Community, New York: Columbia University Press, 1972.

<sup>14</sup>Jaslow, op. cit., 1976.

<sup>15</sup>Atchley, op. cit., 1972.

<sup>16</sup>U. S. Department of Health, Education, and Welfare: Social Security Administration, Research Report No. 47, pp. 43-44, 1976.

<sup>17</sup>Atchley, op. cit., 1972, p. 173.



"Most people voluntarily retire, most frequently because of poor health."

In terms of this study then, poor health can create a set of expectations for retirement satisfaction which can be either negatively or positively associated with social participation.

The next variable examined was income. In all studies reviewed this was the critical variable in developing expectations among persons in the preretirement cohort. Numerous studies illustrate the importance of income. Darnley,<sup>18</sup> for example, reported:

The elderly in the United States in 1970 represented 10% of the general population and 20% of the poor population. Although it is assumed by many that Social Security payments or pension plans account for virtually all elderly income, 30% is derived from work, while 40% of private pensions do not pay off. Overall, one of every three elderly persons is in a state of severe economic deprivation.

Loether<sup>19</sup> discussed how economic factors influence retirement and wrote, "The incomes of the elderly are, on the average, only half as large as those of persons under sixty-five."

Darnley<sup>20</sup> also noted that among retiring persons in the United States there is a singular preoccupation with money. Atchley,<sup>21</sup> and

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<sup>18</sup>Fred Darnley, "Adjustment to Retirement", Family Coordinator, 24:223, 1975.

<sup>19</sup>Loether, op. cit., 1975, p. 148.

<sup>20</sup>Darnley, op. cit., 1975.

<sup>21</sup>Atchley, op. cit., 1972.

Loether,<sup>22</sup> supported this conclusion. Persons with an adequate income who are entering retirement or already retired expect to have higher satisfaction concerning retirement than those who have an inadequate income.

According to Darnley<sup>23</sup> retirement satisfaction is related to the perception of retirement as a time for fulfilling leisure time activities such as travel, hobbies, and other pleasurable concerns. Retirement is envisioned as that time in life to enjoy those things deferred while "earning a living." When those expectations are not met, retirement is viewed as being "put away" or "turned out to pasture", a very unhappy time. For about one third of the elderly this loss of at least half their preretirement income produces downward mobility. Loether<sup>24</sup> concludes this way, "It becomes more evident, that, given good health and adequate financial resources, an important ingredient for a smooth and successful transition from work to retirement is the ability to shift from the work role to other social roles when retirement occurs."

Marriage satisfaction was another variable often cited in the literature as a determinant of expectations for those in the preretirement cohort. The common perception of today that more and more older marriages are ending in divorce seems to lend support for the inclusion

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<sup>22</sup>Loether, op. cit., 1975.

<sup>23</sup>Darnley, op. cit., 1975.

<sup>24</sup>Loether, op. cit., 1975, p. 93.

of marital satisfaction as a variable in preretirement expectations. At present there is a debate over the issue as several studies have found conflicting results. Wesly Burr,<sup>25</sup> using the Blood and Wolfe study, argued that marriage over the life cycle decreased in the level of satisfaction. Boyd Rollins and Kenneth Cannon,<sup>26</sup> on the other hand, argued that marital satisfaction throughout the life cycle is best characterized by the "U" shape. This research concluded that marital adjustment is high at the beginning, declines while children are present and then reverses and rises to about the same level of satisfaction as first experienced.

These differing conclusions relative to the pattern of marital satisfaction can be clarified by examining several variables that appear associated with marital satisfaction either positively or negatively. Atchley<sup>27</sup> reported that the difference between happy and unhappy marriages in retirement is related to the amount of equality in the marriage. He wrote, "This is brought about especially by a gradual loss of boundaries between the sex roles and a decreasing sexual definition of the household division of labor."<sup>28</sup> He also identified another determinant of marital

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<sup>25</sup>Wesly Burr, Successful Marriage, Homewood: Dorsey Press, 1976, pp. 457-467.

<sup>26</sup>Boyd Rollins and Kenneth Cannon, Marital Satisfaction Over the Family Life Cycle", Journal of Marriage and the Family, 36:271-283, 1974.

<sup>27</sup>Atchley, op. cit., 1972.

<sup>28</sup>Ibid., p. 294.

happiness in retirement, and stated, "Older couples who approach retirement life from a predominantly expressive perspective apparently have a better chance for a successful adjustment to retirement than those with an instrumental orientation."<sup>29</sup> In other words, couples who demonstrate much affection towards one another will develop one set of expectations while couples who do not demonstrate affection develop another.

Jaber Gubrium<sup>30</sup> studied the hypothesis that relative isolation (desolation) reflected in becoming widowed, divorced, and single is related to negative evaluations. Gubrium asked the respondents if they felt life was getting worse. The percentages agreeing to this statement were as follows: widowed, 51.6 per cent; divorced 63.6 per cent; single 36.8 per cent; and married 44.4 per cent. This indicated, that in comparison with all other marital statuses, except the single, a retired married couple has less tendency to view life as getting worse. However, nearly half the married people were skeptical that life would not worsen.

As indicated earlier in this chapter, income has an effect on pre-retirement expectations. According to Loether<sup>31</sup> it also affects marital adjustment. He suggested that couples with low income confront several

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<sup>29</sup>Ibid., p. 295, 296.

<sup>30</sup>Jaber Gubrium, "Marital Desolation and the Evaluation of Everyday Life in Old Age", Journal of Marriage and the Family, 36:107-113, 1974.

<sup>31</sup>Loether, op. cit., 1975, pp. 16-22.

role changes such as rearranging household tasks, identifying an appropriate grandparent role when there are no longer the traditional male-female role differences, and realizing that travel dreams and other activities will not be met.

Ira Hutchinson<sup>32</sup> studied the impact of low income on morale of the elderly. Studying two groups, low income and poverty level, he found a significant difference between these two groups as well as between those married and widowed. "With minor exceptions," he said, "neither sex nor marital status made a difference on morale and life satisfactions for the poverty-level elderly: for the low-income elderly, the widowed reported themselves consistently more negatively than did the married."<sup>33</sup> These findings indicate two things regarding income, marital status and expectations in retirement. First, income has a determinate effect on expectations, as indicated by the difference between the low income group and the poverty group on morale and life satisfaction. Second, marital status also affects morale and life satisfaction, indicated by the difference between married and the widowed in the low income group.

From the review of the above literature three variables have been identified as contributing to preretirement expectations. One is health: however, in contrast to what is commonly believed, health often generates

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<sup>32</sup>Ira W. Hutchinson, "The Significance of Marital Status for Morale and Life Satisfaction Among Lower-Income Elderly", Journal of Gerontology, 37:287-293, 1975.

<sup>33</sup>Ibid., pp. 292, 293.

retirement. Furthermore those with poor health expect that retirement will be a time of misery laden with negative experiences. Income and marital status were also viewed as variables defining preretirement expectations. The lower the expected income the more probable was the expectation that retirement will be a negative experience. Marital status contributed in two ways: a married person has more positive expectations than widowed or divorced persons, and couples who demonstrate more expressive supports have more success in retirement.

#### Life Satisfaction

Previous research has attempted to explore the concept of life satisfaction as it deals with the elderly in three basic ways. First, there has been an attempt to relate life satisfaction to an individual's perception of the extent they have satisfactory interpersonal interaction with family, friends, neighbors, and community organizations. Secondly, satisfaction has been related to empirical counts of the numbers and types of interaction an older person has had over a specific period of time. Third, a method relating life satisfaction was developed using a combination of the first two methods and employing a perceived contact scale and a scale which measured actual contact over a specified time to estimate life satisfaction. Following is a review of recent studies of the three methods utilized in relating life satisfaction to other factors.

Elmer Spreitzer and Eldon Snyder<sup>34</sup> focused their study on the correlates of life satisfaction among the aged. They asked the question, "Taking things all together, how would you say things are these days -- would you say that you are very happy, pretty happy, or not too happy?"<sup>35</sup> The response to this question was taken to mean a level of life satisfaction, and the results indicated a positive correlation between perceived life satisfaction and perceived adequacy of health and income.

Spreitzer and Snyder<sup>36</sup> also found an association among age, sex, and life satisfaction. They wrote, "Up to age sixty-five, women tended to report higher rates of life satisfaction than men; however, after age sixty-five men were more likely than women to report a high degree of life satisfaction." These results suggested that health, income, and sex and age influence life satisfaction.

Studying voluntary and involuntary social withdrawal among two hundred and eighty elderly, Lowenthal and Boler<sup>37</sup> utilized the self perception approach. They examined life satisfaction in terms of perceived contact with the environment and the effect of voluntary and

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<sup>34</sup>Elmer Spreitzer and Eldon Snyder, "Correlates of Life Satisfaction Among the Aged", Journal of Gerontology, 29:454-458, 1974.

<sup>35</sup>Ibid., p. 455.

<sup>36</sup>Ibid., p. 458.

<sup>37</sup>Marjorie F. Lowenthal and Deetje Boler, "Voluntary Vs. Involuntary Social Withdrawal", Journal of Gerontology, 20:363-371, 1965.

involuntary withdrawal on life satisfaction. They found that deprivations such as poor health, recent retirement, and physical illness had a greater bearing on life satisfaction than did recent social withdrawal.

Lowenthal and Boler also separated the respondents into four groups: voluntary withdrawn; involuntary withdrawn; not withdrawn, not deprived; and not withdrawn, deprived. Breaking the respondents into these classes revealed that high socioeconomic status was related to voluntary withdrawn, whereas the not withdrawn who had experienced one or more deprivations had the highest proportion of low socioeconomic status persons. When controlling for age and sex two interesting relationships emerged. The age cohort of sixty to sixty-four resembled those seventy-five and older in terms of withdrawal. Lowenthal and Boler<sup>38</sup> suggested this indicated an initial withdrawal between sixty and sixty-four, with a fairly stable plateau of interaction maintained until advanced old age. They also found men were more likely to be neither withdrawn nor deprived; while the women were more likely to be voluntarily withdrawn.

Robert Atchley<sup>39</sup> found the same phenomena in his study of retired teachers and telephone employees. Through further analysis Atchley<sup>40</sup> found that the voluntary withdrawnness among women may be due to the fact

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<sup>38</sup>Ibid.

<sup>39</sup>Atchley, op. cit., 1976.

<sup>40</sup>Ibid.



that women retire when their husbands retire. Most of the women in Atchley's study were younger than their husbands, and, therefore, retired before the mandatory retirement age. Atchley concluded that sex status may be confounded, saying, "It does not seem prudent to make a great deal of sex difference in response to the voluntary retirement question."<sup>41</sup>

Atchley<sup>42</sup> compared male and female life satisfaction in later life, controlling for age, marital status, education, and income adequacy. Life satisfaction was calculated using scales measuring self-concept, psychological well-being, self-reported health, perceived income adequacy, and social participation. Generally, he found that two thirds of both men and women scored high in life satisfaction. Atchley suggested, "Men tend to perceive aging in structural terms and to respond to it by accepting a new position in the social structure happily and/or by realigning their energies and commitments towards the social structure through either disengagement or reengagement."<sup>43</sup> This, he said, was more true for teachers than telephone employees. Women, on the other hand, do not accept social aging. However, they do not attempt to delay it by holding steadfast to their status in the social system. Women respond, instead, with high levels of psychological stress.<sup>44</sup> This

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<sup>41</sup>Ibid., p. 208.

<sup>42</sup>Ibid.

<sup>43</sup>Ibid., p. 210.

<sup>44</sup>Ibid., p. 210.

may be taken to mean that women who have worked during their adult life will at older age have a less than satisfactory perceived life situation.

Philip Jaslow<sup>45</sup> studied a national sample of women to determine the effect of work on women sixty-five and older. He also used perceived adequacy of income, health, and physical incapacity as a measure of life satisfaction. Jaslow found that women who were still working perceived themselves as having an adequate income, good health, and good physical capacities. On the other hand, women with the lowest level of life satisfaction were those who had never worked. Jaslow<sup>46</sup> concluded, ". . . employed women . . . had a higher morale than the retirees, with the exception of those women with annual incomes of \$5,000 or more, among whom the retirees had better morale than the workers."

The studies cited tend to indicate that perceived good health, adequate income, and social participation are all related to high life satisfaction.

A study of widowhood by Helena Lopata<sup>47</sup> developed three models characterizing women fifty years and older on the basis of how they react to the loss of their husband. The first model was labeled the self-initiating woman. Lopata<sup>48</sup> describes her as follows: "The complexity

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<sup>45</sup>Jaslow, op. cit., 1976.

<sup>46</sup>Ibid., p. 217.

<sup>47</sup>Helena Lopata, Widowhood in an American City, Cambridge: Schenkman Publishing Company, Inc., 1973.

<sup>48</sup>Ibid., p. 265.

of the change in her life is likely to be great, but her consciousness of the need to make constant behavioral and relational adjustments is much more developed than that of other widows. Thus, she is not apt to state that she and her life have not changed as a result of the death of her husband. Rather, she spends the time following this event in re-examining the resources of the complex society to see how she can match them with her present and future life goals."

The second model portrays the woman living in an ethnic neighborhood. This type is able to retain or duplicate traditional life because of the wide-spread social support she received from the local ethnic community. Lopata<sup>49</sup> wrote, "Being immersed in kin relations, a very close peer group, or a network of neighbors, such a woman may continue many of her involvements with little modification after being a widow."

The third model is the socially isolated widow who is downwardly mobile due to the loss of husband's income. According to Lopata<sup>50</sup> she is isolated,

. . . either because of her lack of ability to engage in modern society, or because of downward mobility. The widow socialized into passive stances vis a vis the world gradually become isolated, as the extended kin group or neighborhood are no longer available for contact. Never highly engaged in the broader society, the widow is unable to retain prior involvements for a variety of reasons, including mobility, poor finances, or health.

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<sup>49</sup>Ibid., p. 265.

<sup>50</sup>Ibid., p. 266.

Lopata's study suggests that among others, social status and/or residence in an ethnic community may alter perceived life satisfaction.

A study by Lawrence Hynson<sup>51</sup> on rural-urban differences in satisfaction among the elderly indicates that the elderly in rural places do perceive life differently from their urban cousins. His study examined the differences between rural and urban elderly in terms of satisfaction with family, community, overall happiness, and fear at going out by themselves. Hynson<sup>52</sup> found, "The rural elderly were more satisfied with their community, expressed greater general happiness, and had less fear than the urban elderly." City size, however, was not associated with perceived satisfaction with the family.

The previous studies indicate that adequate income, good health, social participation, and living in a rural or close-knit community are associated with satisfactory life satisfaction. The studies that will be reviewed next are those which use behavioral indexes of participation such as times seen by a doctor and other factors.

George Maddox,<sup>53</sup> in his companion studies of activity and morale, examined the relationship between levels of activity and morale. Maddox

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<sup>51</sup>Lawrence M. Hynson, Jr., "Rural-Urban Differences in Satisfaction Among the Elderly," Rural Sociology, 40:64-66, 1975.

<sup>52</sup>Ibid., p. 66.

<sup>53</sup>George Maddox, "Some Correlates of Activity and Morale Among the Elderly", Social Forces, 40:254-260, 1962 and George Maddox, "Activity and Morale: A Longitudinal Study of Selected Elderly Subjects", Social Forces, 42:195-204, 1963.

tested the hypothesis, "Among the elderly a positive relationship exists between activity and morale."<sup>54</sup>

Maddox attempted to explore different types of activities and their association with morale. He found three test factors which modified the relationship between activity and morale. The first factor was physical and psychological. "Regardless of reported high or low activity," he concluded, "morale was more likely to be high when any of these factors were present than when it was absent."<sup>55</sup>

The second test factor Maddox used was social structural, which included occupation and work role maintenance. He wrote: "Subjects relatively at the upper end of the socioeconomic continuum, as indicated by non-manual occupational backgrounds, and those who had experienced a minimum of work role change, were more likely than others to have high activity scores and to give evidence of high morale."<sup>56</sup>

The third test factor was type of activity, interpersonal and non-interpersonal. Maddox<sup>57</sup> found that a total activity score was a somewhat better prediction of morale than any subscore alone. This relationship prevailed except for those subjects over the age of seventy, for whom non-personal activities had a somewhat stronger association with morale.

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<sup>54</sup>Ibid., p. 258, 1962.

<sup>55</sup>Ibid., p. 200, 1963.

<sup>56</sup>Ibid., p. 201, 1963.

<sup>57</sup>Ibid., 1963.

Sheldon Tobin<sup>58</sup> used a combined psycho-sociological approach in his study by asking the respondent about both his perception of his interaction levels and the number of different roles the respondent plays. By using both objective measures and subjective measures Tobin was able to conclude, ". . . social interaction is positively associated with life satisfaction for all ages . . . and that, with advanced age, this association is increased rather than decreased."<sup>59</sup>

Finally, Mary Heltsley and Ronald Powers<sup>60</sup> examined social interaction and the perceived adequacy of interaction among rural aged. They used two measures to reflect interaction: first, the number of reported contacts respondents had with others during the seven day period preceding the interview; second, a scale of the perceived fulfillment derived from these personal relationships.

Heltsley and Powers<sup>61</sup> concluded:

1. Living near by may mean that children interact with aged parents more often, although their parents may not perceive the intensity and extensity of that interaction as being more satisfying, especially when interaction is with daughters.

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<sup>58</sup>Sheldon Tobin, "Life Satisfaction and Social Interaction in the Aging", Journal of Gerontology, 16:344-346, 1961.

<sup>59</sup>Ibid., p. 346.

<sup>60</sup>Mary E. Heltsley and Ronald C. Powers, "Social Interaction and Perceived Adequacy of Interaction of the Rural Aged", Gerontologist, 15:533-536, 1975.

<sup>61</sup>Ibid.

2. Age, health, marital status, or economic situations of the age have little influence on the reported contact with children and friends.

3. Regardless of the amount of interaction of the aged with their children and others, satisfaction regarding the interaction may not be achieved.

This section of the review of literature has discussed the psychological and the sociological factors associated with life satisfaction. Also discussed were several ways life satisfaction has been conceptualized. Morale, happiness, and life satisfaction all seemingly have the same essential meaning; namely, the perception of life as adequate.

#### Educational expectations of the elderly

This section will review recent literature on the manner in which educational expectations of the elderly have been studied. This section will also deal with the notion of life-span education, which recognizes the fact that upon reaching the age of sixty, most Americans have an additional life expectation of twelve years. The last part of this section will review literature pertaining to institutional, environmental, or psychological barriers that prevent the elderly from participating in education.

There have been three orientations used recently to research the educational expectations of the elderly. The first has been commonly referred to as the "functional needs assessment." This orientation has focused on needs perceived by professional educators in gerontology.

An example of this orientation is McClusky's<sup>62</sup> "theory of margin" which is based on the perspective of developmental psychology. This theory relates "load," or the demands placed on the elderly to "power," or various resources the elderly person can draw on to deal with life's demands.

McClusky<sup>63</sup> has deduced a hierarchy of functional needs. They are:

1. Coping needs.
  - a. "Three R's" (reading, writing, computation)
  - b. Physical needs (nutrition, exercise)
  - c. Economic self-sufficiency
  - d. Legal, housing, and leisure needs
2. Expressive needs (activity for its own sake).
3. Contributive needs (service, altruistic uses of knowledge).
4. Influence needs (political education and participation).
5. Transcendence needs (to rise above the limitations of old age).

This orientation, then, attempts to establish a hierarchy of needs and predict from these the expectations the elderly have for education.

A second orientation is that of Market Analysis. This orientation focuses on the empirical findings derived from field surveys of the

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<sup>62</sup>H. Y. McClusky, "Education for Aging: The Scope of the Field and Perspectives for the Future", in S. Grabowski and W. D. Mason, editors, Learning for Aging, Washington: Adult Education Association of the U.S.A., 1974.

<sup>63</sup>Ibid.



elderly to find out what they see as important or of interest to them. Henrickson,<sup>64</sup> in a review article of previous research, suggests the following priority ranks of education needs of the elderly:

1. Religion
2. Problems of aging
3. Physical fitness
4. Leisure activities
5. The arts
6. Public affairs
7. Practical problems

A study conducted by Graney and Hays<sup>65</sup> utilized the market approach. They concluded, "The results support the findings and inferences of past research, particularly with respect to the inverse relationship between interest in higher education and chronological age among older people, and the direct relationship between interest and previous education attainment."<sup>66</sup> Wasserman,<sup>67</sup> studying the rural residents in Michigan county, examined the educational interests of the elderly and found similar association.

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<sup>64</sup>A. Henrickson, "Working with Senior Citizens", in A. Henrickson, editor, A Manual on Planning Education Programs for Older Adults, Tallahassee: Department of Education, Florida State University, 1973.

<sup>65</sup>Marshall J. Graney and William C. Hays, "Senior Students: Higher Education After Age Sixty-two", Educational Gerontology, 1:343-359, 1976.

<sup>66</sup>Ibid., pp. 351-353.

<sup>67</sup>Ira M. Wasserman, "The Educational Interests of the Elderly", Educational Gerontology, 1:323-330, 1976.

Wasserman<sup>68</sup> concluded, however, "that at the present time there is a limited market for adult education among elderly respondents in Washtenaw County."

The last orientation is theory construction. This orientation combines some aspects of both functional needs assessment and market analysis strategies. The theory developed by Havighurst,<sup>69</sup> suggests that educational expectations be dichotomized into instrumental and expressive. He writes, "Instrumental education is education for a goal that lies outside and beyond the act of education."<sup>70</sup> "Expressive education is education for a goal that lies within the act of learning, or so closely related to it that the act of learning appears to be the goal."<sup>71</sup>

Roger Hiemstra,<sup>72</sup> using this theoretical approach, examined the elderly in several Nebraska communities. He found ". . . a significant preference for instrumental learning was in both course selection and in actual learning activities."<sup>73</sup> Examining the data for demographic

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<sup>68</sup>Ibid., p. 320.

<sup>69</sup>Robert J. Havighurst, "Education Through the Adult Life Span", Educational Gerontology, 1:41-51, 1976.

<sup>70</sup>Ibid., p. 41.

<sup>71</sup>Ibid., p. 42.

<sup>72</sup>Roger Hiemstra, "Older Adult Learning: Instrumental and Expressive Categories", Educational Gerontology, 1:2270236, 1976.

<sup>73</sup>Ibid., p. 231.

differences Hiemstra found that non-college educated elderly were slightly more prone to select instrumental education than college education. Males and rural residents were significantly more likely to pick instrumental topics. He concluded, "The findings presented suggest that older individuals not only have a variety of education preferences but also are engaging in a variety of learning projects each year."<sup>74</sup>

Literature is available describing how institutions of higher education have reacted to the elderly student. This reaction has generally taken the form of expanding the definition of education to fit the umbrella concept, life-long education. David Peterson<sup>75</sup> said life-long education

denotes the type of educational programming which is conceptually based on the data provided by life-span psychologists. It focuses attention on the lifelong process of human development and emphasized education as an intervention mechanism to maximize functioning. (p. 437)

Using this definition, Peterson<sup>76</sup> isolates three emphases in life long learning.

The first emphasis on vocational preparation and development focuses on three differing need periods in the life span: skill development for entry into an occupation; skill development in order to change occupa-

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<sup>74</sup>Ibid., p. 233.

<sup>75</sup>David A. Peterson, "Life-Span Education and Gerontology", Gerontologist, 15:436-441, 1975.

<sup>76</sup>Ibid.

tions or, especially for women, to re-enter the work force; and skills training necessary to maintain an active life after retirement.

The second emphasis of life long learning relates to leisure time preparation and usage. This emphasis is seen in two phases: the productive use of leisure time in adulthood and the more purposive use in later life of interests and pursuits that can develop into full time activities.

The last emphasis of life long learning is on attitudes toward aging, aimed at developing positive images of the aging process. There are many points of educational emphasis in this particular area, starting with elementary school through college and into adulthood. Even after retirement, it is still appropriate to provide educational experiences to foster positive attitudes toward aging. Life long learning posits cradle to grave education, in each of the three areas of emphasis there is a component focused on the elderly.

The Academy for Educational Development published a book, Never Too Old to Learn,<sup>77</sup> which pointed out some of the more successful educational programs for the elderly in the United States. This report suggests that two elements are necessary in successful programs. The first is maintaining communication. The report states, "Communication must flow simultaneously in two directions---from the college to the

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<sup>77</sup>Academy for Educational Development, Never Too Old To Learn, a report submitted to the Edna McConnell Clark Foundation: New York, 1974.

audience it hopes to reach, plus feedback from older people to the college."<sup>78</sup> This approach is somewhat foreign to persons in higher education in that faculty are not accustomed to asking students what should be taught and what teaching methods should be used.

The other factors the Academy for Educational Development suggests is involvement. The report concludes, "The education of older people should involve them in the world in which they live."<sup>79</sup> This means the elderly need to be involved in the planning, implementing, and evaluation of programs or educational experiences for them.

Studies have also examined barriers to educational utilization. Leroy Hixson<sup>80</sup> outlined six factors that may be barriers for the elderly participation in the educational setting. First, is the classroom itself, where formality and atmosphere of the traditional classroom is restrictive for the older student. Another factor is the lessened agility of the older student. Third, the possible discomfort for the student. Fourth, homework, examinations, term papers, and grades. Fifth, the special language of academic discipline may be conceptually difficult. Last, the barrier of the word "school." All six barriers

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<sup>78</sup>Ibid., p. 36.

<sup>79</sup>Ibid., p. 40.

<sup>80</sup>Leroy E. Hixson, "Non-threatening Education for Older Adults", Adult Leadership, 74-75, 1969.

underscore the fact that the elderly may have misconceptions about formal education that inhibit their participation.

Bruce Goodrow<sup>81</sup> in a study of Knox County, Tennessee, confirmed the six barriers of Hixson. In addition three other factors limiting participation were poor vision, home responsibilities, and lack of transportation. He found that the limiting factors for males were "related to the intrinsic nature of educational opportunities rather than physical or geographic difficulties usually attributed to environmental factors."<sup>82</sup> Women differed from men in that they did not like night time activities.

A barrier that is consistently reported is the preponderance of self-educating activities that the elderly find available and utilize. March, Hooper, and Baum,<sup>83</sup> Hiemstra,<sup>84</sup> and Daniel, Templin, and Shearon<sup>85</sup> all report that many elderly perceive education as a life long process and involved with a number of information learning projects. Hiemstra

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<sup>81</sup>Bruce A. Goodrow, "Limiting Factors in Reducing Participation in Older Adult Learning Opportunities", Gerontologist, 15:419-422, 1975.

<sup>82</sup>Ibid., p. 420.

<sup>83</sup>G. B. March, J. O. Hooper, and J. Baum, "Life Span Education and the Older Adult", Educational Gerontology, 2:163-172, 1977.

<sup>84</sup>Hiemstra, op. cit., 1976.

<sup>85</sup>David E. Daniel, Robert G. Templin, and Ronald W. Shearon, "The Value Orientations of Older Adults Toward Education", Educational Gerontology, 2:33-42, 1977.

concludes, "Perhaps the clearest implication from this study is that educators must learn how to remove their institutional blinders and recognize all the self-directed, independent learning going on and needed outside institutional structures."<sup>86</sup>

Graney and Hays<sup>87</sup> examined the relative importance of ten barriers to pursuing higher education by dichotomizing their sample into interested and disinterested respondents. For interested persons the three barriers cited most frequently were information concerning courses, costs involved in taking courses, and time. Those who expressed a disinterest in taking courses did so because they were not interested in course offerings, felt too old to learn, and thought they would feel out of place in the classroom.

#### Summary of Literature Review

The literature suggests the following findings which are relevant to this study.

1. Preretirement expectations. One is health: however, in reverse to what is commonly held, health often generates retirement. Furthermore those with poor health expect that retirement will be a time of misery laden with negative experiences. Income and marital status were also viewed as variables defining preretirement expectations. The lower the expected income the more probable was the expectation that retirement

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<sup>86</sup>Hiemstra, op. cit., p. 337, 1976.

<sup>87</sup>Graney and Hays, op. cit., 1976.

would be a negative experience. Marital status contributes in two ways: a married person has more positive expectations than widowed, or divorced persons, and couples who demonstrate more expressive supports have more success in retirement.

2. Life satisfaction. Morale, happiness, and life satisfaction all seemingly have the same essential meaning; namely, the perception of life being adequate. For the purposes of this study, life satisfaction is seen as contributing to student image. This section of the review of literature has discussed the psychological and sociological factors associated with life satisfaction. Also discussed were several ways life satisfaction has been conceptualized.

3. Educational expectations of the elderly. Three approaches to the study of the elderly's expectations for education were presented; functional needs assessment, market approach, and the theoretical approach. Also discussed was the institutional reaction to the elderly participating in college and university courses. Last, the barriers to educational participation on the part of the elderly were discussed.

This review of the literature has identified several sets of variables that have in the past explained educational participation of the elderly. The next chapter will use several of these variables to develop a theoretical model.



## CHAPTER III

### THEORETICAL FRAMEWORK

#### Introduction

The scientific inquiry into social phenomena has several criteria by which it is determined to be scientific. One of these criteria is theory, and Kerlinger<sup>1</sup> suggests that theory is the basic aim of science. Kerlinger defines a theory as, ". . . a set of interrelated constructs (concepts), definitions, and propositions that present a systematic view of phenomena by specifying relations among variables, with the purpose of explaining and predicting the phenomena."<sup>2</sup> This definition specifies three things about theory. First, a theory is a set of propositions which consist of defined and interrelated concepts. Secondly, a theory establishes the interrelations among a set of variables and, by establishing these interrelations, presents a systematic view of the phenomena. Thirdly, a theory explains phenomena.

With this understanding of theory, this chapter presents a theoretical orientation, develops a conceptual model, and develops a theoretical framework for this study.

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<sup>1</sup>Fred N. Kerlinger, Foundations of Behavioral Research, second edition, Chicago: Holt, Rinehart and Winston, Inc., 1973, pp. 8-10.

<sup>2</sup>Ibid., p. 9.

### Theoretical Orientation

According to Merton<sup>3</sup> much of what is written in texts as being sociological theory is not theory but general orientations toward substantive materials. A theoretical orientation is a general orientation which involves broad postulates, and these suggest types of variables. These variables are to be taken into account but do not specify relationships among the variables. A general orientation facilitates the process of arriving at specified relationships or determinate hypotheses. This, then, is the aim of this section of this chapter.

Social Gerontology, being a relatively new field of scientific inquiry, has few theoretical orientations. Those that have developed have stemmed from a particular philosophical view of older people. Moody<sup>4</sup> has developed four philosophical views of the older person from a sociological viewpoint. First is that society perceives the older person as being dysfunctional. Therefore, the older person is rejected as not playing any beneficial role in society. The assumptions underlying this view are: 1) society is a megamachine based on technology, growth, change, development and progress; therefore, old people are expendable

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<sup>3</sup>Robert K. Merton, Social Theory and Social Structure, enlarged edition, New York: The Free Press, 1968, pp. 139-155.

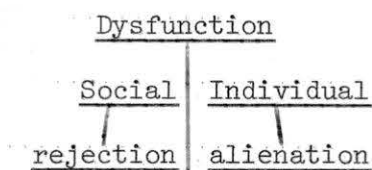
<sup>4</sup>Harry R. Moody, "Philosophical Presuppositions of Education for Old Age", Educational Gerontology, 1:1-16, 1976.

just as old machines and technologies are expendable; 2) there is an overwhelming emphasis on the centrality of knowledge and expansive power; consequently, the older person, with their emphasis on wisdom, shattered dreams, and limited future orientations, are relegated to nonentities.

With these assumptions concerning society and older people, the characteristics of older persons are seen from a theoretical viewpoint as being ones of neglect, family abandonment, mandatory retirement, poverty and segregation.

Figure 1

PHILOSOPHICAL ORIENTATION AND SOCIOLOGICAL PERSPECTIVE



The first philosophical orientation (Fig. 1) holds that through society's rejection of the elderly the individual's response is that of alienation.

The second philosophical orientation is that of the social services. Moody<sup>5</sup> suggests it is best understood "... as an expression of the ideology of political liberalism and the institutions of the welfare

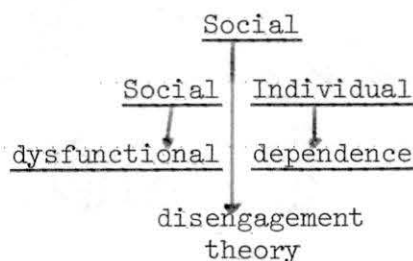
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<sup>5</sup>Ibid., p. 4.

state; unmet human needs require the intervention of public policy to deal with casualties of industrialized society." This second orientation views the older person as dysfunctional for society, but it views society as having a moral obligation to maintain the older person's existence. The disengagement theory of Elaine Cumming and William Henry<sup>6</sup> has come from this orientation. This theory posits that the aging person gradually withdraws from interaction with society, and that this withdrawal is a mutual process between the individual and society.

Figure 2

## PHILOSOPHICAL ORIENTATION AND SOCIOLOGICAL PERSPECTIVE



The second philosophical orientation (Fig. 2) depicts society as viewing the elderly as dysfunctional and the elderly's response is one of dependence. Furthermore, out of this philosophical orientation has come the disengagement theory of Cumming and Henry.

The third philosophical orientation is that of participation. The central assumption of this orientation suggests the older person actively participates in society at the level he is capable until his death.

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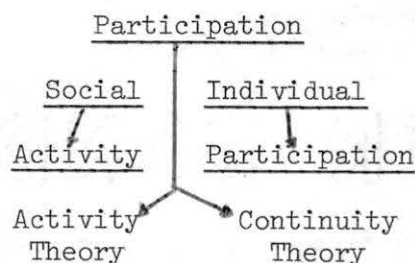
<sup>6</sup>Elaine Cumming and William Henry, Growing Old, New York: Basic Books, 1961.

This orientation suggests that the individual will choose when to diminish his activities, whereas the first two orientations see activity being diminished because of societal pressures. The first is activity theory of Robert Havighurst,<sup>7</sup> which holds that the norms for old age are the same as those for middle age, and that the older person should be judged in terms of a middle age system for measuring success.

The second theory emerging from this orientation is that of continuity theory developed by Bernice Neugarten.<sup>8</sup> This theory holds that the individual's reaction to aging can be explained by examining the complex interrelationships among biological and psychological changes. Unlike the disengagement theory and the activity theory, continuity theory does not posit the direction aging will take but suggests that it can go in any of several directions.

Figure 3

PHILOSOPHICAL ORIENTATION AND SOCIOLOGICAL PERSPECTIVE



The participation orientation (fig. 3) depicts society as viewing the elderly as maintaining activity and the elderly's response is that

<sup>7</sup>Robert J. Havighurst, "Personality and Patterns of Aging", Gerontologist, 8:20-33, 1968.

<sup>8</sup>Robert C. Atchley, The Social Forces in Later Life: Belmont, California: Wadsworth Publishing Company, 1972, pp. 30-38.

of participation. Spinning out of this orientation is the activity theory of Havighurst and the continuity theory of Neugarten.

The last general philosophical orientation Moody suggests is that of self-actualization. The assumption of this orientation is that there is something uniquely possible in old age that is only available at this stage in the life cycle. No theory has been developed from this orientation, as Moody suggests, in that ". . . self-actualization is much harder to describe because in many ways it posits goals of spiritual and psychological growth that are completely outside the prevailing values of modern society."<sup>9</sup>

Figure 4

PHILOSOPHICAL ORIENTATION AND SOCIOLOGICAL PERSPECTIVE

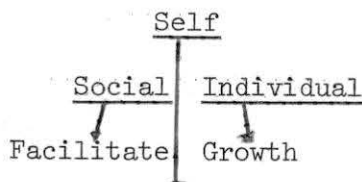


Figure four depicts the notion that through society's valuing the elderly role, society facilitates the elderly in their quest for growth, whether psychological or spiritual in nature.

The previous paragraphs have described four orientations of the aged and described the three major theories in social gerontology. The remainder of this chapter will develop a theoretical model integrating

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<sup>9</sup>Moody, op. cit., p. 8.

continuity maintenance into the larger theoretical framework of role theory. Two concepts of role theory will be used, role perspective and role adaptation. We will focus on that aspect of role perspective that suggest a person has several alternative roles from which to choose when making decisions to select a new or altered role. Role adaptation is that decision to take a new or altered role.

The theoretical orientation provided by role theory and continuity maintenance is consistent with stated objectives of the Older American's Program as well as the findings from recent studies by Atchley<sup>10</sup> and Neugarten.<sup>11</sup>

The major thrust we will take is that as people age they confront role expectations that are significantly different than those perceived previously. As a person nears the age of sixty-five he enters a time in life where his perception of his role may change. Role perception is a concept that has two distinct meanings. First is the notion of how one thinks he should perform a role. Second is the notion that a person has several role alternatives from which to choose as he makes significant changes in his life-style. The second definition of role perception will be used in developing this theory.

The above discussion of role perception indicates for this theoretical development that as a person reaches the age of transition from worker to

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<sup>10</sup>Robert C. Atchley, "Retirement and Leisure Participation: Continuity or Crisis", The Gerontologist, 11:29-32, 1971.

<sup>11</sup>Bernice Neugarten, Personality in Middle and Later Life, Atherton Press: New York, 1964.

retired, several alternative roles may be perceived as acceptable. These perceived alternative roles have an influence upon the decision to adopt a new role. Role adaptation is the decision to take on a new or different role that has a new or different set of expectations. Figure 5 portrays the association between role perception and role adaptation.

Figure 5

ASSOCIATION BETWEEN ROLE PERCEPTION AND ROLE ADAPTATION

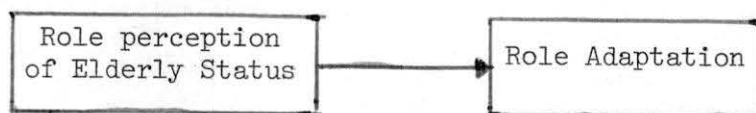


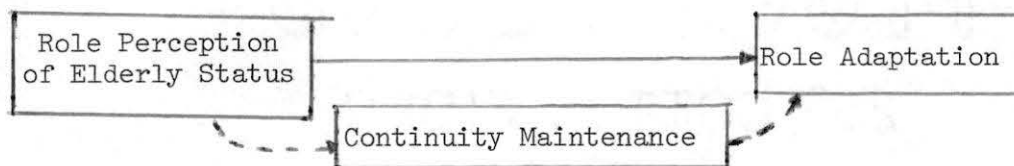
Figure 5 illustrates that as a person perceives the role of the elderly, the individual will make a decision to adopt one of those roles and the role perception comes first.

Another concept that influences role adaptation is continuity maintenance. Maintaining continuity means the maintenance of activities, satisfactory interactions, social statuses, and self-images developed in the middle age of a person's life. To do this, each aging person makes adaptations among a set of alternatives that he perceives as appropriate in order to maintain continuity of life and accommodate new roles. The adaptations an individual chooses, then, are based partly on the types of continuity he wants to maintain. Figure 6 portrays the association between role perception and role adaptation when continuity maintenance is added.



Figure 6

THEORETICAL ORIENTATION WHEN  
CONTINUITY MAINTENANCE IS ADDED



The dotted lines in Figure 6 illustrate that the association among role perception, continuity maintenance and role adaptation is tentative in that the association has not been suggested or tested to this point in time. The solid line indicates that the association between role perception and role adaptation has been tested. This model would suggest, then, that the extent to which an elderly person would anticipate participating in a new role would be the consequence of perceiving such a role as desirable and consistent with the maintenance of his life continuity.

#### Conceptual Model

Developing a conceptual model for a research project has several fruitful outcomes. As Merton<sup>13</sup> noted, it is not a theory but "... an indispensable phase of theoretic work." Identifying central concepts enables the specification and clarification of key variables. In the specification and clarification process the interrelationships of the concepts emerge which enhance the theory building process. Another

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<sup>13</sup>Merton, op. cit., p. 143-145.

crucial aspect of building a conceptual model, according to Merton, is the guiding of the collection and analysis of data. Thus, through careful conceptual development the conceptual arrangements and inter-relationships will facilitate the definition and identification of variables and to make explicit the character of data subsumed under a concept. Last, Merton<sup>14</sup> suggests, ". . . a further task of conceptual analysis is to institute observable indices of the social data with which empirical research is concerned." Using Merton as a guide the following discussion will develop a conceptual model for this study.

The first task for this study, based on the theoretical orientation given above, is to delineate the key concepts which specify and clarify role perception, continuity maintenance and role adaptation.

Role Perception. The first concept to be specified and clarified is role perception. As stated in the theoretical orientation role perception is taken to mean the range of alternative roles an elderly person thinks he has when moving from worker to retired person. Recognizing the various alternative roles open to the individual at this time in life, but focusing the theory toward the student role the question arises as to what are the concepts that can explain this choice? This question leads to the concept of educational roles for the elderly.

Choosing an educational role means perceiving education as a life-time process. That is education is for more than preparation for a career and it is for serving other interests an individual may have.

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<sup>14</sup>Ibid., p. 146.

Conceptually related to this notion of the educational role is the individual's desire for learning. That is, the educational role is worth the effort to become involved with learning. This desire for learning may be for learning new skills or learning for the sake of learning. Motivation to participate is another concept involved with educational roles. Motivation is taken to be those other forces other than desire to become involved with learning. Motivation to participate in an educational course on the part of the elderly may be for accomplishing something in the community or increasing personal competence.

Figure 7

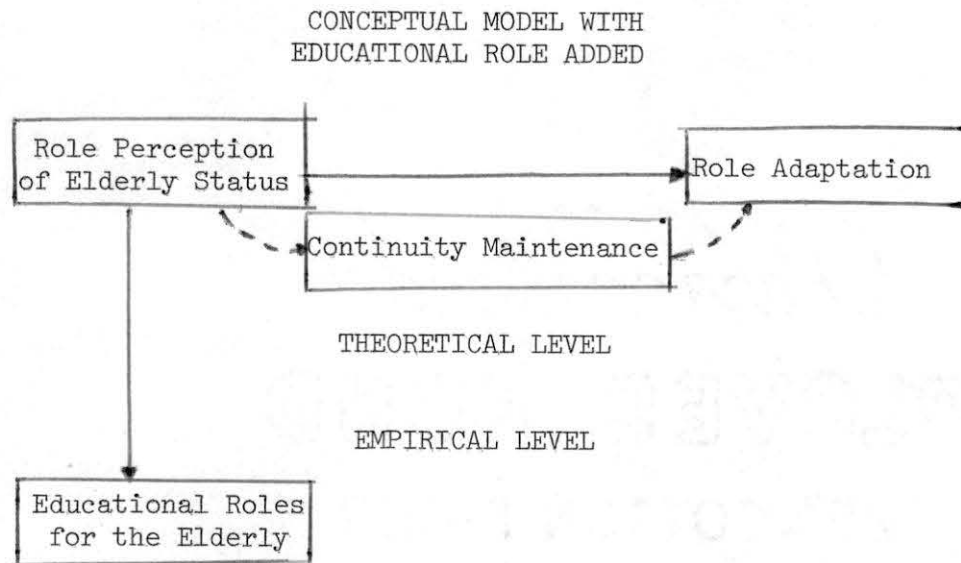


Figure 7 suggests the following:

1. There are various role perceptions for the elderly and one of these can be the educational role.

2. The educational role is the empirical manifestation of the theoretical concept role perception.

Continuity Maintenance. First, it must be pointed out that continuity means continuation of prized or valued meanings of life, not necessarily the specific life experience. In other words, it is not the title of worker -vs- retired worker that is significant but the valued part of the work that is continued. For example, a person may have the occupation of farmer but the valued part of farming may be working with his hands. Therefore, a person may retire from farming but continue doing things with his hands which is continuity of his life processes.

With the above definitional clarification and specification of continuity, four factors can be delineated for further specification and clarification of continuity. They are social interaction, physical capabilities, situational opportunities, and experience. First is interaction level and satisfaction with the differing interactions. Social interaction can be on two levels: one is numbers of interaction necessary for continuity of life processes and the second is the level of satisfaction with these differing interactions.

Physical capabilities involve the health of a person as well as physical skills that have been used in maintaining life processes. This, then is a straight forward factor measuring the physical condition of the individual.

Situational opportunities refer to those activities which are open or closed to a person due to geographical life space, economic resources, and value orientation. The last concept is that of experience. For the purpose of focusing on the student role experience is used to identify those past experiences related to education.

Figure 8

CONCEPTUAL MODEL WHEN CONTINUITY  
MAINTENANCE IS DELINEATED

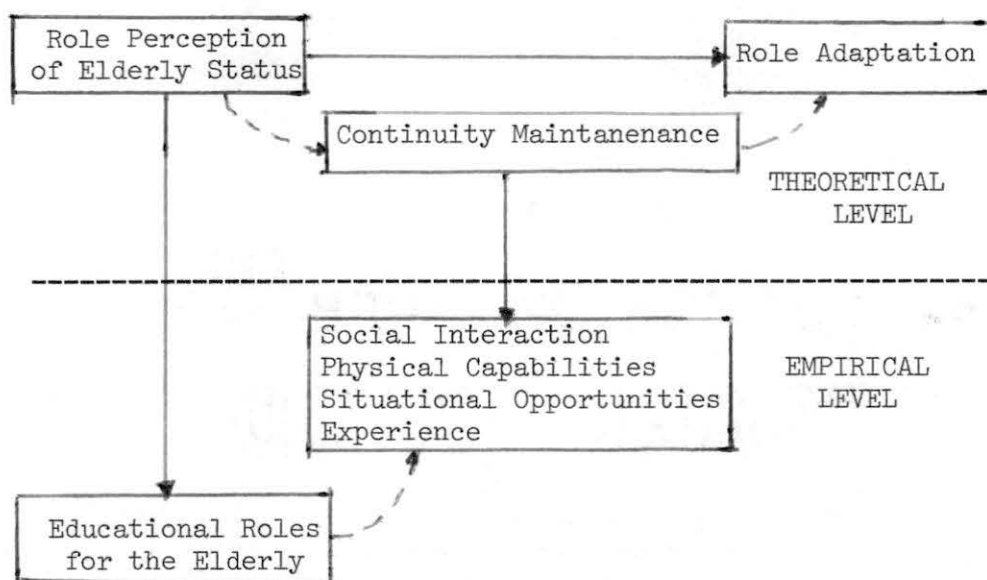


Figure 8 illustrates those influences that have been stated above with the addition of the delineation of continuity maintenance.

1. At the empirical level, the educational role tentatively influences social interaction, physical capabilities, situational opportunities and experience.

2. Social interaction, physical capabilities, situational opportunities and experience are empirical manifestations of continuity maintenance.

Role Adaptation. The other key concept to be specified is adaptation. As Atchley<sup>15</sup> suggests "... adaptation can go in any of several

<sup>15</sup>Robert C. Atchley, "Retirement and Leisure Participation: Continuity or Crisis", The Gerontologist, 11:36, 1971.

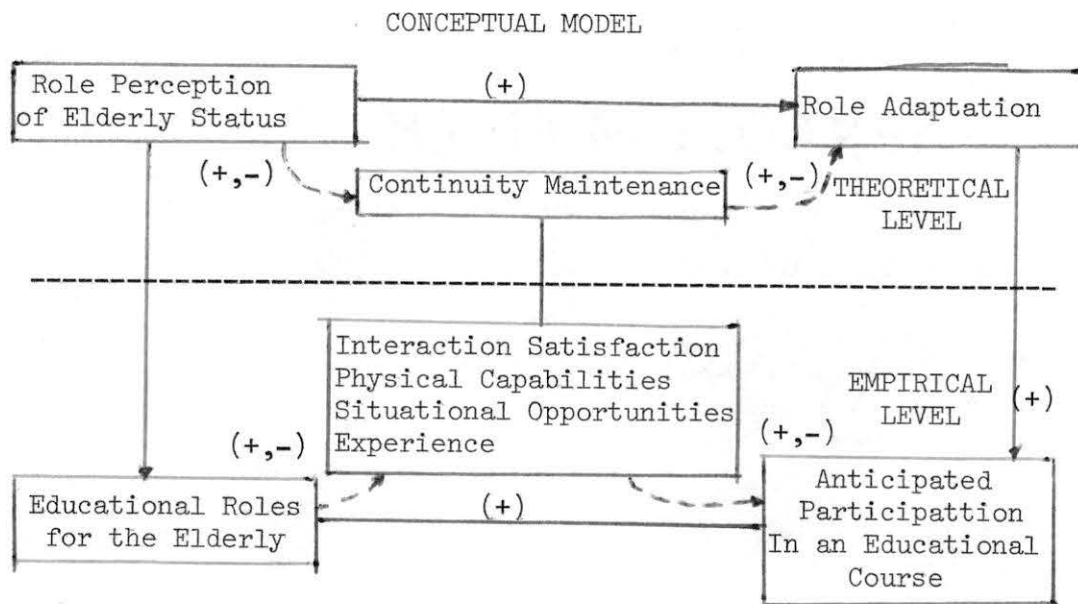
directions." This direction is dependent upon those concepts discussed above. Neugarten<sup>16</sup> summarizes adaptation or coping in the following fashion:

Coping patterns therefore seem to become stable over time, and the individual comes to deal with his environment in well-established and habitual ways. Perhaps the most striking personality phenomena to be seen in these cases are the abilities to synthesize, to rationalize, and to reorganize experience. Much in the way that individuals substitute for biological losses as they move from middle into old age, as they learn to conserve physical energy and to compensate for lessened acuity of the senses, so do they also seem to make adjustments for losses of cognitive processes---for the slippage of memory, for example.

From Neugarten's summary, one of the adaptations possible as a person becomes older is that of participating in educational activities. Further this participation can be anticipated due to the habits and predispositions developed throughout an individual's life.

Figure 9 illustrates the conceptual model previously discussed.

Figure 9



<sup>16</sup>Neugarten, op. cit., p. 197-198.

The plus sign signifies a positive relationship, the minus sign indicates a negative relationship and a plus and minus sign indicates no direction is predicted.

Examination of Figure 9 suggests the following:

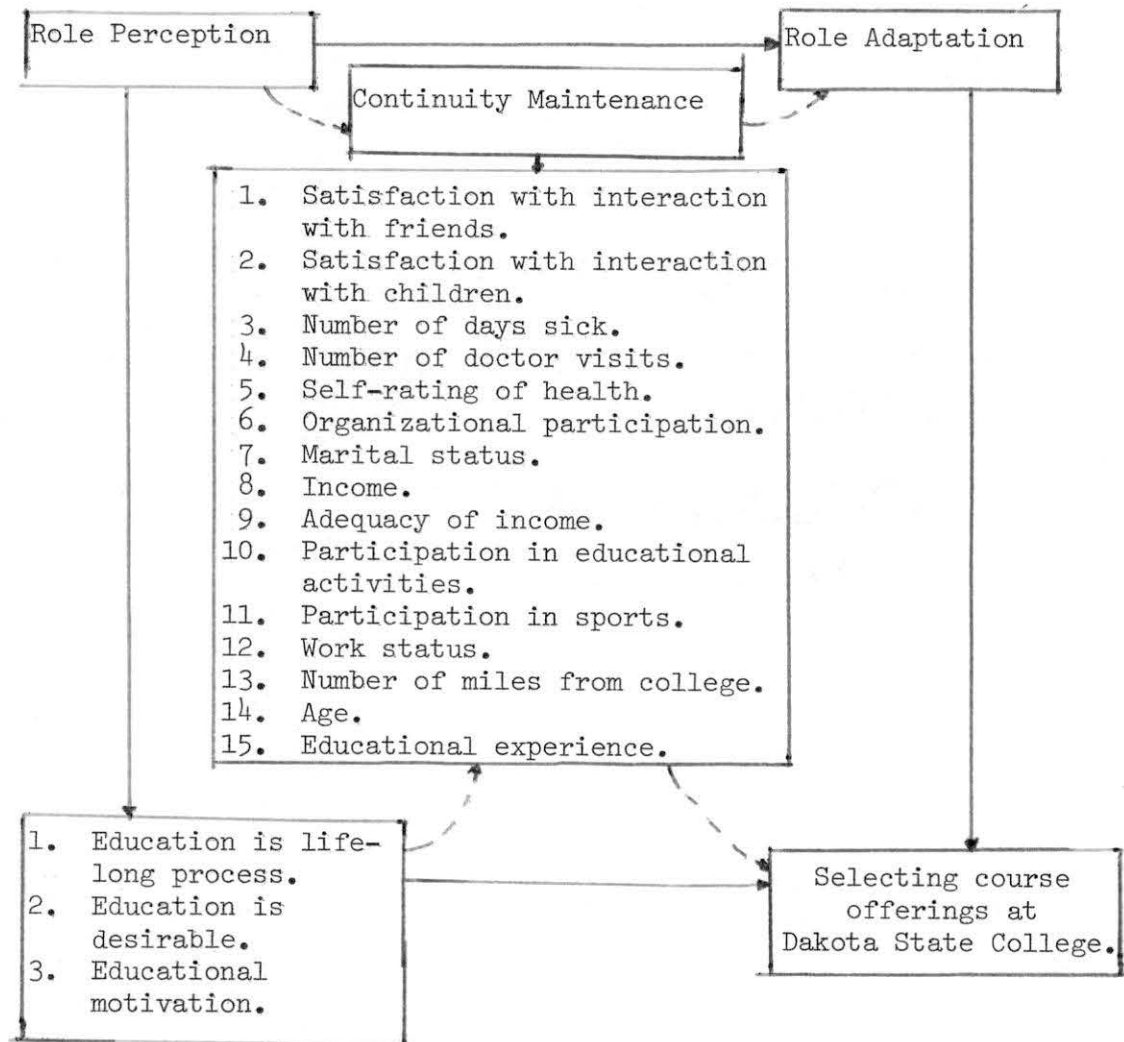
1. The elderly will anticipate participating in an educational course when they selectively identify the educational role as an appropriate role for the elderly.
2. Tentatively, the higher the satisfaction with social interaction, the more physical capabilities they have, the greater situational opportunities they have and the more positive experiences with learning in the past the more the elderly will anticipate participating in an educational course.

Theoretical Model. The last element that is to be developed is constructing a theoretical model linking the conceptual model with empirical indices. This is done through as Merton<sup>17</sup> suggests propositional arrangements and presenting conditional statements and appropriate definitions. Figure 10 portrays how the theoretical concepts are linked horizontally to one another and how they come down to the empirical level.

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<sup>17</sup>Merton, op. cit., p. 143.

Figure 10  
THEORETICAL MODEL



Examination of Figure 10 suggests the following propositions:

I. Role adaptations that individuals make when assuming elderly status are the consequences of their perception of elderly roles and tentatively their personal ability to maintain life continuity.



- A. Role perception for the elderly person is all the roles in the repertoire of the status of the elderly. Educational role for the elderly is one of the roles in this repertoire.
- B. Role adaptation is the selective identification of certain roles from the individual's repertoires as more characteristically themselves than other roles. Selecting a course to enroll is one possible adaptation.
- C. Tentatively this selective identification is the practical consequences of the individual's attempt to maintain present role behaviors.

II. The more the elderly selectively identify the educational role as being within the status of the elderly the more likely an elderly person will select a course to enroll and tentatively the more an individual thinks that selecting a course in which to enroll as being consistent with present role behavior the more likely he will do so.

- A. Defining educational roles as a life-long process, desirable and possessing high motivation to participate in education is a role perception.
- B. Continuity maintenance is defined as satisfactory social interaction with friends and children, number of days sick, number of doctor visits, self-ratings of health, organizational participation, marital status, income, adequacy of income, participation in educational activities, participation in sports, work status, number of miles from college, age, past educational experience.
- C. Anticipated participation in education is the selecting of courses offered by Dakota State College in the near future.

From the above propositions and statements of definition, the following research hypothesis will guide the study.

The greater the belief that education is a life-long process, the more that education is deemed desirable, the stronger the motivation toward education, the more satisfactory social interaction with friends

and children, the fewer number of days sick, the fewer numbers of visits to a doctor, the higher the organizational participation, the individual is married, the greater the income, the higher the perceived adequacy of income, higher participation in informal educational activities, higher participation in sports, the individual is retired, fewer number of miles from college, the closer the person is to retirement age, and positive past educational experiences, the elderly will more often select a course at Dakota State College in which to enroll.

Level of acceptance of this model. The above model will be accepted if the theoretical model can explain more than fifty-one percent of the variance in selecting courses at Dakota State College. Likewise, the theoretical model will be rejected if it does not explain more than fifty-one percent of the variance.

## CHAPTER IV

### METHODOLOGY

This chapter specifies the research methods appropriate for this study: the unit of analysis, sampling procedure, data collection techniques, variables, method of analysis and the specified level of significance.

#### Unit of Analysis

The unit of analysis for this study was the individual respondent. Specifically, the units of analysis were individuals who were at least fifty years of age but no more than seventy years of age on their last birthday and who had permanent residence within thirty-five miles of Dakota State College.

#### Data Collection

The Interview Schedule. The instrument for this study was a closed interview schedule, administered personally to respondents in their homes by a team of trained interviewers. The schedule covered the following areas: place of residence, sex, interaction with friends, interaction with family members, work status of friends, educational purposes, attendance at meetings with an educational focus, perception of education as a life-long process, propensity to start new activities, perception of education as desirable, class offerings at Dakota State College, systemic barriers to returning to school, leisure time activities, organizational

participation, educational motivation, health, age at last birthday, marital status, occupation, perceived adequacy of income, income, and number of years at present address. The interview schedule was pretested and evaluated for reliability and validity. A copy of the schedule is attached as Appendix I.

The Sample. For size purposes of sampling, a population was specified as being all persons between the ages of forty-nine and sixty-nine whose names were recorded on the 1977 South Dakota State personal property tax returns in the counties of Miner, Lake, McCook, Moody, Kingsbury, Brookings and Minnehaha; and who resided in the cities or towns of Madison, Chester, Ramona, Rutland, Egan, Flandreau, Oldham, Howard, Salem, Humboldt, Colton, Montrose, Wentworth, Winfred, Sinai, Arlington, Lake Preston and Canova. Appropriate ranges for these communities were established, and a ten percent sample was selected and stratified by community of residence. The resulting sample size was two hundred and two.

#### Procedures for Analysis

The resulting data were coded and recorded on IBM punch cards following standard approved procedures.

The data were retrieved to:

1. Develop a descriptive analysis of the extent the respondents anticipate participating in educational classes.
2. Identify the differing conditions under which the educational classes offered would be taken by the respondents.

3. Determine what factors explain anticipated participation in educational activities of the elderly.

Descriptive Analysis. The responses to the question, "Assuming no barriers (such as health, transportation, finances, or time) to what extent do you feel you would participate in the following educational programs or classes in the future?" were summed and the percentages were reported.

Differing Conditions. Tabulations were compiled reporting the extent differing conditions under which the classes may be offered would effect the respondents taking courses and reported by percentage.

Regression Analysis. A step-wise multiple linear regression equation was used to test the association among several independent variables and the dependent variable.

#### Variables

The variables were as follows:

Dependent Variable. The dependent variable was the sum of the responses to the question, "Assuming no barriers (such as health, transportation, finances, or time) to what extent do you feel you would participate in the following educational programs or classes in the future?" when the responses were coded as follows:

1. Would not take
2. Interested, but not take
3. Probably would take
4. Would definitely take

Twenty-four selected courses were specified, and included:

1. A geography class such as Geography of South Dakota
2. A course that studied people as individuals
3. A course that studied people in groups and society
4. History of civilization
5. History of South Dakota
6. American Government
7. State and Local Government
8. International Politics
9. English or Literature
10. Drama
11. Painting or Jewelry Making
12. A Foreign Language
13. Introduction to Journalism
14. Television and Film Arts
15. Music
16. General Metals and Woodworking
17. Welding
18. Crafts
19. Health and Physical Education such as Personal Health, Community Health, Physical Fitness, Social Dance, and Recreational Games
20. Math/Science such as Introduction to Computers, Consumer Math, Medical Terminology, Chemistry, Biology, Physical Science, Physics, and Conservation Principles

21. A course in Business and Business Management
22. Principles of Insurance
23. Retirement Planning
24. Estate Planning

Independent Variables. Eighteen independent variables, reflecting predisposition to assume educational roles and factors essential for continuity maintenance were specified as follows:

$X_1$ . Social interaction with friends, measured by the following four Likert scale items, the responses to which were summed:

- A. I have as many friends as I did five years ago.
- B. I enjoy entertaining my friends.
- C. It gets tiring when I entertain my friends too often.
- D. I go out with my friends as often as I like.

Each statement was responded to with one of the following:

1. Strongly disagree
2. Disagree
3. Somewhat disagree
4. Uncertain
5. Somewhat agree
6. Agree
7. Strongly agree

$X_2$ . Interaction between respondents and their children, measured by the following three summated Likert scale items:

- A. I see my children often enough.
- B. I do not feel up to the extra effort when my children visit me.
- C. When my family include me in their plans, I enjoy it.

The responses for these items were coded the same as for variable  $X_1$ .

$X_3$ . Organizational participation, measured by a summated index composed of the number of organizations the respondent has or presently belongs to, the number of organizations in which the respondent is presently a member, and the number of meetings the respondent attended in the last year.

$X_4$ . The number of days respondent reported being sick in the last six months.

$X_5$ . The number of visits to a doctor by respondent in the last six months.

$X_6$ . The respondent's reply to the question, "How would you rate your health?" when the responses were coded as follows:

- 1. Failing
- 2. Poor
- 3. Fair
- 4. Good
- 5. Excellent

$X_7$ . Distance of respondent's residence was from Dakota State College measured in miles.

$X_8$ . Marital status, was coded as:

- 1. Not presently married
- 2. Married



X<sub>9</sub>. Income lived on last year, categorized as follows:

1. \$000-\$2999
2. \$3000-\$4999
3. \$5000-\$7999
4. \$8000-\$11,999
5. \$12,000 or above

X<sub>10</sub>. Adequacy of income, as measured by the respondent's reply to the question, "How adequate do you consider your income to be?" when the possible responses were:

1. Not enough
2. Barely enough
3. Enough
4. More than enough

X<sub>11</sub>. Work status, as measured by the following question, "What is your work status right now?" when the responses possible were:

1. Working full time
2. Working part-time
3. Working around the house
4. Not working

X<sub>12</sub>. Educational experience, measured by the number of years of completed formal education.

X<sub>13</sub>. Participation in educational activities, a summated index measured by the extent to which respondents had participated the past year in the following activities:

- A. Amateur dramatics
- B. Art work
- C. Book reading for pleasure
- D. Going to fairs and exhibitions
- E. Watch television
- F. Literary writing
- G. Magazine reading
- H. Newspaper reading
- I. Attend a symphony or band concert
- J. Go see a play performed
- K. Use the public library
- L. Visit museums and art galleries
- M. Special hobbies

The responses were coded as follows:

- 1. Never
- 2. Seldom
- 3. Occassionally
- 4. Often
- 5. Frequently

X<sub>14</sub>. Participation in sporting activities, a summated index measured by the extent to which respondents had participated the past year in the following activities;

- A. Dancing
- B. Indoor team recreation (table games)
- C. Indoor individual recreation (bowling, pool)
- D. Outdoor team sports (trap shooting, volleyball)
- E. Outdoor individual sports (golf, fishing, hunting)

These items were coded the same as for variable  $X_{13}$ .

$X_{15}$ . Perception of education as a life-long process, measured by the following six Likert summated scale items:

- A. Education is a life-time process, both inside and outside the classroom.
- B. Education is appropriate only when job or career oriented.
- C. Education is only for those in the traditional ages.
- D. Education is for increasing the enjoyment of life.
- E. It's very important that people continue to learn as they get older.
- F. Going back to school is a good way to make use of my time.

These responses were coded as in variable  $X_1$ .

$X_{16}$ . Perception of education as desirable, as measured by the following four Likert scale summated items:

- A. I mainly want to learn more so I can contribute better to society.
- B. I like to take classes so I can share knowledge with my friends.

C. I think the only reason for going to school is learning reading and study skills.

D. I learn as much from people who attend classes as I learn from the class.

The responses were coded the same as above.

X<sub>17</sub>. Educational motivation, as measured by the following six summated Likert scale items:

A. I receive as much or more pleasure from the completion of an educational program or course as from participation in the activities.

B. I participate in educational activities to accomplish purposes for which I stand.

C. Participation in educational activities allow me to let myself go and have some real fun.

D. One reason why I would seek educational programs is to bring about improvements I consider desirable.

E. I like to take part in educational programs just to learn something new.

F. An important result of getting more education is to increase personal competence.

The items were coded the same as above.

X<sub>18</sub>. Age as measured by the respondent's age as of their last birthday and classified as follows:

1. 65 and over
2. 50-54
3. 60-64
4. 55-59

#### Null Hypothesis

For purposes of testing the conjectured association among the independent variables with the dependent variables, the following null-hypothesis was formulated: The set of independent variables,  $X_1$  through  $X_{18}$ , will not contribute significantly to the explanation of the variant anticipated participation of the elderly in course offerings at Dakota State College, when the variables are defined as specified above.

#### Level of Significance

The specified level of significance is .05.

## CHAPTER V

### DESCRIPTIVE ANALYSIS

This chapter examines the data in order to report findings related to the first two objectives of this study.

The first objective was to determine to what extent the persons age fifty to seventy years of age and residing in small towns within thirty-five miles of Dakota State College anticipate participating in educational activities. Findings relevant to this objective will be reported in answer to the following:

1. What is the anticipated participation of respondents as a whole?
2. How does the participation vary from one course to another?
3. How does the anticipated participation of respondents vary when courses are grouped into selected areas of study?

The second objective of this study was to identify how different conditions in the way in which educational classes might be offered may effect the respondent's anticipated participation in course offerings. To accomplish this objective the effect of selected institutional conditions related to providing a course on anticipated participation in educational classes will be examined.

#### Anticipated Levels of Participation for Courses as a Whole

In order to determine to what extent respondents anticipate taking educational offerings from Dakota State College, the data were aggregated

by summing the responses pertaining to specific courses, mainly items twenty-four through forty-seven on the questionnaire (Appendix I). To obtain the data, respondents were handed a card that had four responses. The interviewer then named each specific course, and the respondents answered with one of the following:

1. Would not take it
2. Interested, but probably not take it
3. Would probably take it
4. Would definitely take it

The responses were tabulated and reported in Table I. For purposes of comparison, the summated values were categorized as follows: 60-72, definite participator; 48-54, probable participator; 36-47, interested participator; and 24-35, non-participator.

TABLE I

LEVEL OF ANTICIPATED PARTICIPATION IN  
COURSES AS A WHOLE, BY NUMBER AND PERCENTAGE

	Number	Percentage
Definite Participators	31	15.3
Probable Participators	59	29.2
Interested Participators	57	28.2
Non-Participators	54	26.7

As reported in Table I, fifteen percent of respondents were definite participators; thirty percent, probable participators; twenty-eight percent, interested participators; and twenty-seven percent, non-participators.

#### Specific Courses Respondents Anticipate Taking

To examine how the respondents anticipate participating according to each type of course, the data were tabulated and reported in Table II by percentage for each individual course.

TABLE II

RESPONDENTS' REPLIED TO THE QUESTION,  
"ASSUMING NO BARRIERS TO WHAT EXTENT DO YOU FEEL  
YOU WOULD PARTICIPATE IN THE FOLLOWING EDUCATIONAL  
PROGRAM OR COURSES IN THE FUTURE?" BY  
PERCENTAGE

COURSE	WOULD DEFINITELY TAKE	WOULD PROBABLY TAKE	INTERESTED BUT WOULD NOT TAKE	WOULD NOT TAKE
Geography	14.4	24.8	21.8	39.1
Psychology	10.9	26.2	22.3	40.6
Sociology	8.9	27.7	22.3	41.1
History	10.4	17.3	21.3	51.0
History of South Dakota	21.3	34.7	15.3	28.7
American Government	13.9	25.7	18.3	42.1
State-Local Government	18.3	28.7	18.8	34.2
International Politics	5.9	13.9	20.3	59.9



TABLE II  
(Continued)

COURSE	WOULD DEFINITELY TAKE	WOULD PROBABLY TAKE	INTERESTED BUT WOULD NOT TAKE	WOULD NOT TAKE
English Literature	13.4	23.8	16.3	46.5
Drama	4.0	10.4	10.9	74.8
Jewelry/Painting	14.4	12.9	12.9	59.9
Foreign Language	6.9	18.8	13.4	60.9
Journalism	3.5	9.9	13.4	73.3
TV & Film Making	5.9	7.4	12.9	73.8
Music	15.8	20.3	18.3	45.5
Woodworking and General Metals	11.4	15.8	9.9	62.9
Welding	5.0	5.0	5.4	84.7
Crafts	17.3	24.3	14.9	43.6
Health and Physical Education	17.3	25.3	19.8	37.6
Math or Science	7.9	9.9	16.3	65.8
Business Management	15.3	21.8	17.3	45.5
Introduction to Insurance	6.4	14.9	18.8	59.9
Retirement Planning	17.8	27.2	15.8	39.1
Estate Planning	14.4	21.3	10.9	53.5

Examination of Table II reveals variant anticipated participation by the respondents in the specific course offerings. For example, the percentages of respondents who definitely would take specific courses range from a high of twenty-one percent for History of South Dakota to a low of four percent for Journalism. The percentages of respondents who probably would take a course range from thirty-five percent for the History of South Dakota to five percent for Welding, a course, incidentally, that was selected by eighty-five percent of the respondents as a course they would not take. A general visual inspection of the table also reveals that more than fifty percent of the respondents are either interested, but would not take, or would not take a given course.

For purposes of determining which courses have potential as suitable offerings for the elderly, it was assumed that if fifteen percent of the elderly were definite participators then any course offering selected by the respondent fifteen percent of the time or more as would definitely take would be a good course to offer to the elderly. Based on this criteria the following courses would have high potential: History of South Dakota, State-Local Government, Music, Crafts, Health and Physical Education, Small Business Management, and Retirement Planning.

#### Extent Respondents Would Take Courses in Selected Areas of Study

To find out which subject areas were attractive to respondents, the courses were assigned into selected areas of study based on the academic administrative structure at Dakota State College. The following courses were considered social science: Geography, Psychology, Sociology, History,

History of South Dakota, American Government, State and Local Government, and International Politics. Courses in the humanities were English Literature, Drama, Jewelry Making and Painting, Foreign Language, Journalism, Television and Film Making, Music, Woodworking or General Metals, Welding, and Crafts. Business courses were: Business Management, Principles of Insurance, Retirement Planning, and Estate Planning. Interest in health and physical education courses was measured by a single item containing a list of courses such as Personal Health, Community Health, Physical Fitness, Social Dance, and Recreational Games. Interest in math and science was measured by a single item containing a list of courses, such as Introduction to Computers, Consumer Math, Medical Terminology, Chemistry, Biology, Physical Science, Physics, and Conservation Principles.

Table III reports the percentages for each category.

TABLE III  
EXTENT RESPONDENTS WOULD TAKE  
COURSES IN SELECTED AREAS OF STUDY  
BY PERCENTAGES

SELECTED AREA OF STUDY	DEFINITELY TAKE	PROBABLY TAKE	INTERESTED BUT NOT TAKE	NOT TAKE
Social Science	13.1	24.8	20.0	42.0
Humanities	9.7	14.8	12.8	62.5
Health/Physical Education	17.3	25.3	19.8	37.6
Math/Science	7.9	9.9	16.3	65.8
Business	13.4	21.2	15.7	49.5

Table III shows that a greater proportion of respondents would take health and physical education courses than other types of offerings. Over forty-two percent of the respondents indicated they would either definitely take or probably take a course in this area. Over one-third of the respondents reported they would either definitely take or probably take courses in social sciences and business: thirty-eight percent and thirty-four percent, respectively. Fewer than one fourth of the respondents indicated they would definitely take or probably take humanities or math and science courses; twenty-four percent and eighteen percent respectively.

#### Institutional Conditions and Their Effect on Anticipated Participation

The second objective of the study was to identify how differing conditions in the way in which educational courses might be offered may effect the respondent's anticipated participation. The data for this second objective were derived from items forty-eight through sixty-four on the questionnaire, which focused on certain conditions related to the way courses might be offered. Respondents were read the following statement, "If you were to enroll in one of the courses discussed in the last section, what effect would any of the following have on your decision?" the respondent was asked to reply to each with one of the following answers:

1. Stop me from taking the course
2. Hinder me from taking the course
3. Effect it

4. Effect it somewhat
5. Would have no effect

The data were then computer tabulated to gain the necessary statistical information for reporting. The percentages for each item are presented in Table IV.

TABLE IV

RESPONDENTS' REPLIES TO THE QUESTION,  
 "IF YOU WERE TO ENROLL IN ONE OF THE COURSES  
 DISCUSSED IN THE LAST SECTION, WHAT EFFECT  
 WOULD ANY OF THE FOLLOWING HAVE ON YOUR DECISION?"  
 BY PERCENTAGE

SELECTED CONDITIONS	WOULD HAVE NO EFFECT	WOULD EFFECT SOMEWHAT	WOULD EFFECT	WOULD HINDER	WOULD STOP ME
Course is offered for credit	58.9	8.9	15.8	5.4	10.9
Course is offered for non-credit	73.3	7.9	7.4	4.5	6.9
Course is offered on Dakota State College campus	44.6	11.9	20.8	5.4	17.4
Course if offered in respondent's community	50.0	11.4	31.2	3.0	4.5
Knowledge as to proper way to enroll	59.4	13.9	12.9	6.9	6.9
Cost of Course	34.2	15.8	29.2	7.9	12.9
Course includes tests	50.5	12.9	21.8	5.9	8.9
Course includes dicussion but not tests	57.9	15.3	16.3	4.0	6.4
Course is offered over 16 weeks	41.1	18.8	18.8	9.4	11.9

TABLE IV  
(Continued)

SELECTED CONDITIONS	WOULD HAVE NO EFFECT	WOULD EFFECT SOMEWHAT	WOULD EFFECT	WOULD HINDER	WOULD STOP ME
Course is offered for one month or less	63.4	9.4	15.8	2.5	8.9
Course offered in Fall	62.9	9.4	13.9	4.0	9.9
Course offered in Winter	37.1	12.9	18.8	12.9	18.3
Course offered in Spring	53.5	9.4	16.3	6.9	13.9
Course offered in Summer	35.1	11.4	17.8	8.4	27.2
Enrolled are students of all ages	80.2	5.0	5.4	2.5	6.9
Enrolled are students age 50 years and above	80.7	5.9	7.4	.5	5.4
Class attendance required	52.5	13.4	20.3	5.4	8.4

Table IV indicates that none of the selected conditions for offering a course would have a great effect on the respondent's decision to enroll in a course as fifty percent or more of the respondents replied that these conditions would have no effect or would effect somewhat. Five of the conditions did fail to obtain the fifty percent mark when the response "would have no effect" is taken by itself. These five conditions are (1) Course is offered at Dakota State College, (2) Cost of the course, (3) Course is offered for 16 weeks, (4) Course is offered in the Winter, and (5) Course is offered in the Summer.

Table IV indicates the respondents have a greater preference for taking a course for non-credit (73.3 percent) as compared with taking a course for credit (58.9 percent). There is little difference between respondents' preference in terms of taking a course at Dakota State College (44.6 percent) and in their own community (50.0 percent). Over one-third of the respondents indicated that cost would have no effect, but nearly thirty percent said that it would effect their decision. Having discussions (57.9 percent) was somewhat preferred to having tests (50.5 percent). Most of the respondents preferred having a class for a month or less (63.4 percent) compared to having a class for an entire semester (41.1 percent). Fall (62.9 percent) and Spring (53.5 percent) are the two seasons the respondents most preferred to take a class. Ages of the students in a class appear to be unimportant, as eighty percent of the respondents indicated that this would not effect their decision. A little over one-half of the respondents indicated that required class attendance would have no effect on their decision to enroll or not enroll.

#### Summary

In summary, it was found that:

1. Fifteen percent of the respondents would definitely take a class in the future, thirty percent would probably take a class, twenty-eight percent were interested, and twenty-seven percent were non-participants.

2. The specific courses that have high potential for enrollment are: History of South Dakota, State-Local Government, Music, Crafts,

Health and Physical Education, Small Business Management and Retirement Planning.

3. The academic division at Dakota State College where respondents would take the most courses was health and physical education.

The analysis of the data for the second objective indicate:

1. Respondents are more likely to take a course if it is offered for non-credit.

2. There is a slight preference for the course to be offered in the respondents' own community.

3. Costs of taking a course most effects their decision to take a course.

4. The respondents slightly prefer to have discussions rather than tests.

5. Respondents prefer to take a course for a month or less rather than a full semester.

6. The Fall and the Spring are the seasons of the year respondents prefer to take a class.

7. The age of the students in a class would not hinder greatly their decision to enroll.

8. Required attendance would not effect the decision for over half of the respondents.



## CHAPTER VI

### EXPLAINING FACTORS OF ANTICIPATED EDUCATIONAL PARTICIPATION

This chapter examines the extent to which the conceptual model developed in Chapter III explains the respondents anticipated participation in educational courses at Dakota State College. Therefore, the following reports the analysis of the step-wise multiple linear regression findings applicable to the model.

#### Null Hypothesis

The stated null hypothesis was: The set of independent variables,  $X_1$  through  $X_{18}$ , will not contribute significantly to the explanation of the variant anticipated participation of the elderly in course offerings at Dakota State College, when the variables are defined as specified in Chapter IV.

#### Statistical Findings

Eighteen independent variables were entered into the regression equation with the dependent variable. Seven of the independent variables contributed significantly to the explanation of the variation in the dependent variable. Table V summarizes the significant statistical findings. The complete table for both significant and non-significant variables in the regression equation is given in Appendix II.

TABLE V

SUM OF SQUARES, PROPORTION OF EXPLAINED  
VARIANCE, CUMMULATIVE PROPORTION OF  
EXPLAINED VARIANCE, REGRESSION COEFFICIENT,  
AND Y INTERCEPT OF THE SIGNIFICANT  
INDEPENDENT VARIABLES AS ENTERED  
INTO THE REGRESSION EQUATION

Variable Number	Sum of Squares	Proportion of Variation	Cummulative Proportion of Variation	Regression Coefficient	Y Intercept
X <sub>17</sub>	7952.71	0.47555	0.47555	0.47555	-23.80030
X <sub>14</sub>	11062.19	0.22615	0.56087	0.34423	
X <sub>15</sub>	12331.28	0.03609	0.59217	0.35544	
X <sub>3</sub>	13184.75	0.02427	0.61232	0.33219	
X <sub>16</sub>	13870.56	0.01950	0.62804	0.34953	
X <sub>13</sub>	14400.03	0.01506	0.63991	0.38219	
X <sub>7</sub>	14827.61	0.01216	0.64935	0.13203	

Table V summarizes the significant statistical findings. Seven independent variables were found to significantly explain the observed variation in the dependent variable. These results require the rejection of the null hypothesis. The above seven variables combined explain nearly sixty-five percent of the observed variation in the dependent variable.

Table V indicates that those respondents who most anticipate participating in courses offered by Dakota State College were characterized by

1. Greater motivation to participate in educational activities.
2. Greater participation in educational leisure time activities that are of a sporting nature.
3. Greater perception of education as a life-long process.
4. Greater organizational participation.
5. Greater perception of education as desirable.
6. Greater participation in leisure time activities that are educational in nature.
7. Greater distance of residence from Dakota State College.

#### Summary

The regression analysis indicated that seven of the eighteen independent variables contributed significantly to the explained variation in anticipated participation in a course offering. These seven variables, when combined jointly, explained nearly 65 percent of the observed variation in the anticipated participation of the respondents to take courses offered by Dakota State College.

At the end of Chapter III the criteria for accepting or rejecting the theoretical model was stated. According to that criteria the model can in part be accepted in that seven of the eighteen variables explained sixty-five percent of the observed variation.

## CHAPTER VII

### SUMMARY, CONCLUSIONS, IMPLICATIONS, LIMITATIONS AND SUGGESTIONS FOR FURTHER RESEARCH

#### Introduction

This chapter summarizes this dissertation by reviewing the procedures taken to guide the study. First, the statement of the problem will be reviewed along with the objectives. Second, a summary of the literature will be presented. Next, the theoretical orientation will be summarized pointing out the major concepts. Then, the research methods and the findings of this study will be summarized. From the findings some general conclusions will be presented concerning both theoretical and practical applications of the findings. Next, some implications will be suggested that arise from those conclusions. Finally, several limitations of the study, as well as some suggestions for further research will be presented.

#### The Research Problem

For over a decade it has been observed that the birthrate in the United States has been decreasing and for several decades the life span has been increasing. These two trends have occasioned many institutional representatives to begin rethinking some time honored notions. Higher education is one such institution which has to begin this rethinking process, for these two demographic trends have generated several concerns. The first has to do with the declining number of people in the traditional

ages for the student population. The second concern is the question, "Do people, especially older people, who are in the non-traditional age category, have an interest in higher education, and in what kind of courses would they take part?"

South Dakotans share these same concerns. Therefore, the major question for this study was: What is the anticipated participation of the elderly in educational activities sponsored by higher education in South Dakota?

A set of objectives was formulated reflecting the main thrust of the statement of the problem, namely:

1. To determine what extent the persons who are fifty through seventy years of age anticipate participating in educational activities.
2. To identify how different conditions in the way in which educational classes might be offered may effect the respondents anticipated participation in course offerings.
3. To ascertain what factors explain anticipated participation in educational activities of the elderly.

#### Review of Literature

The review of the literature revealed three major areas related to this study. They were preretirement expectations, life satisfaction and educational expectations of the elderly.

The major generalizations from the literature concerning preretirement expectations were:

1. Those with poor health expect that retirement will be a time of misery laden with negative experiences.
2. The lower the expected income the more probable was the expectation that retirement will be a negative experience.
3. A married person has more positive expectations than widowed or divorced persons.
4. Couples who demonstrate more expressive supports have more success in retirement.

Major generalizations for life satisfaction were:

1. Good health, high income, being a male retiree and being sixty-eight to seventy years of age leads to positive life satisfaction.
2. Perceived good health, adequate income and social participation are all related to high life satisfaction.
3. Living in rural or close knit communities is associated with positive life satisfaction.
4. Social interaction with friends and family tends to increase satisfaction among the aged, especially among those who are retired.

Major conclusions concerning educational expectations were:

1. Older individuals not only have a variety of educational preferences but also are engaging in a variety of learning projects each year.

2. Educational institutions have developed the concept of life-long education which emphasizes education in later life as an intervention mechanism to maximize functioning.

3. There are several institutional barriers between the elderly and educational institutions, and the one that seems to hinder the most is that educators must learn how to remove their institutional blinders and recognize all the self-directed, independent learning going on and needed outside institutional structures.

#### Theoretical Orientation

The theoretical perspective derived from social gerontology, that guided this study was role theory. From this theory, the major propositions were:

I. Role adaptations that individuals make when assuming elderly status are the consequences of their perception of elderly roles and tentatively their personal ability to maintain life continuity.

- A. Role perception for the elderly person is all the roles in the repertoire of the status of the elderly. Educational role for the elderly is one of the roles in this repertoire.
- B. Role adaptation is the selective identification of certain roles from the individual's repertoires as more characteristically themselves than other roles. Selecting a course to enroll is one possible adaptation.
- C. Tentatively this selective identification is the practical consequences of the individual's attempt to maintain present role behaviors.

II. The more the elderly selectively identify the educational role as being within the status of the elderly the more likely an elderly

person will select a course to enroll and tentatively the more an individual thinks that selecting a course in which to enroll as being consistent with present role behavior the more likely he will do so.

- A. Defining educational roles as a life-long process, desirable and possessing high motivation to participate in education is a role perception.
- B. Continuity maintenance is defined as satisfactory social interaction with friends and children, number of days sick, number of doctor visits, self-ratings of health, organizational participation, marital status, income, adequacy of income, participation in educational activities, participation in sports, work status, number of miles from college, age, past educational experience.
- C. Anticipated participation in education is the selecting of courses offered by Dakota State College in the near future.

From the above propositions and statements of definition, the following research hypothesis guided the study.

The greater the belief that education is a life-long process, the more that education is deemed desirable, the stronger the motivation toward education, the more satisfactory social interaction with friends and children, the fewer numbers of days sick, the fewer numbers of visits to a doctor, the higher the organizational participation, the individual is married, the greater the income, the higher the perceived adequacy of income, higher participation in informal educational activities, higher participation in sports, the individual is retired, fewer number of miles from college, the closer the person is to retirement age, and positive past educational experiences, the elderly will more often select a course at Dakota State College in which to enroll.



### Methodology

A ten percent sample was drawn of persons age fifty through seventy and residing in towns in a thirty-five mile radius of Madison. An interview schedule was developed reflecting some of the major findings from the review of literature and tempered by the theoretical orientation. The interview schedule was pretested for validity and reliability and then taken to the field. Two hundred and two interviews were taken in the respondent's home by a team of trained interviewers. The dependent variable and the independent variable for each of the objectives were specified and operationally defined and the data were examined or tested for descriptive and analytical purposes.

### Findings

Chapter V presented the findings relevant to the first two objectives of this study. The first objective was to determine to what extent that persons age fifty through seventy years of age anticipate participating in educational course offerings by Dakota State College. The findings were:

1. Fifteen percent of the respondents would definitely take a class in the future, thirty percent would probably take a class, twenty-eight percent were interested, and twenty-seven percent were non-participants.
2. The specific courses that have high potential for enrollment are: History of South Dakota, State-Local Government, Music, Crafts, Health and Physical Education, Small Business Management, and Retirement Planning.

3. The academic division at Dakota State College that respondents would take the most courses was Health and Physical Education.

The second objective of this study was to identify how different conditions in the way in which educational classes might be offered may effect the respondents anticipated participation in course offerings.

The analysis of the data for the second objective indicated:

1. Respondents are more likely to take a course if it is offered for non-credit.

2. There is a slight preference for the course to be offered in the respondent's community.

3. Costs of taking a course effects most their decision to take a course.

4. The respondents slightly prefer to have discussions rather than tests.

5. Respondents prefer to take a course for a month or less rather than the full semester.

6. The Fall and the Spring are the seasons of the year respondents prefer to take a class.

7. The age of the students in a class would not hinder greatly their decisions to enroll.

8. Required attendance would not effect the decision for over half of the respondents.

Chapter IV sets down the research hypothesis to examine the third objective of this research, namely, to ascertain how the specified factors

explain anticipated participation in educational activities of the elderly.

The results of this investigation found that those respondents who would most anticipate participating in courses offered by Dakota State College were characterized by:

1. Greater motivation to participate in educational activities.
2. Greater participation in educational leisure time activities that are of a sporting nature.
3. Greater perception of education as a life-long process.
4. Greater organizational participation.
5. Greater perception of education as desirable.
6. Greater participation in educational leisure time activities.
7. Greater distance of residence from Dakota State College.

### Conclusions

1. A large market for educational offerings by Dakota State College to the elderly does not exist. The percentage of people between the age of fifty through seventy who could be classified as definite participators was only fifteen percent. This is a rather low percentage when compared to the percentage of those in the traditional student population who attend college. For example, this fifteen percent of the population would represent about two hundred and twenty-five people out of the seventeen hundred and seventy-four persons age 65 and over in Lake County, according to 1975 population estimate. Although fifteen percent is a small percentage, for a college the size of Dakota State College 225 potential clients from Lake County alone represents a rather substantial increase in student population.

2. Elderly students will more likely take courses at Dakota State College that relate to their social statuses as pre-retired or retired persons. The courses the respondents selected most frequently indicate they are interested in course offerings related to their status in life, public policy issues related to the retirement years and health and physical activities that are of a concern to the elderly. In other words, the respondents are seeking information or techniques to maintain involvement politically, mentally or physically as they grow older.

3. The conditions under which the respondents would take course offerings at Dakota State College is not particularly important. Five of the conditions did indicate some concern. They are (a) courses offered for 16 weeks, (b) courses offered in the Winter or (c) Summer, (d) the cost of the course and (e) courses offered on Dakota State College campus. Generally, the respondents were not looking for special course offerings, given in special places and under different conditions than the usual college setting.

4. The academic division at Dakota State College best suited to deliver courses for the elderly is Health and Physical Education. This suggests the concern on the part of the respondents for continued health and physical activity to maintain their health and physical condition as they continue to grow older.

5. Elderly persons who currently participate in informal educational and sporting activities will also tend to take courses at Dakota State College. These people, then, see participating in educational courses

as one more activity to which they may participate to gain involvement or maintain involvement in the community.

6. Theoretically, the model developed in Chapter III was supported in that about sixty-five percent of the explanation of the variation in anticipated participation in course offerings was explained by variables related to perception of educational roles for the elderly. Four of the seven significant variables were those defined as continuity maintenance. Three of the variables - educational leisure activities, sporting leisure activities and organizational participation - are educational in nature and may be behavioral confirmation of their perception of educational roles for the elderly. One of these continuity variables, distance of residence from Dakota State College may be a spurious association in that about two thirds of the respondents lived in towns outside of the city of Madison. The larger number of respondents living a greater distance may unduly influence the relationship between distance and anticipated participation in educational activities.

#### Implications of the Study

The findings and conclusions of this study imply the following:

1. If and when Dakota State College embarks on an effort to include the elderly in their student population, it must recognize that the population is not large enough to supplant the present student population. Alternative sources of student population must also be included, such as the twenty-five to thirty-five years olds or those seeking to change careers.

2. Administratively, any effort to bring the elderly segment into the student body of Dakota State College might best be placed in the Health and Physical Education Division. Over seventeen percent of the respondents indicated they were interested in a physical activity type course which was the largest percentage of any of the academic divisions selected for course offerings. Furthermore, courses offered under this guise would appear to gain favorable acceptance.

3. The courses that will be taught must be for a month or less and be taught in the Spring or Fall. Another implication related to consideration of offering a course is that some type of information system must be developed in order for the elderly to learn about the present course offerings, because the respondents did not perceive that the present conditions under which courses were being offered as hindering their decision to take a class. Since cost was found to be a hinderance, more publicity should be given to the elderly concerning reduced tuition rates to senior citizens of South Dakota.

4. Recognizing that organizational participation, educational leisure time activities and sporting activities are related to anticipated participation, the service clubs and recreational directors would be places to direct information concerning course offerings.

5. Implications from the findings of this study suggest that a college or university should focus on the perception of educational roles for the elderly when developing course offerings, even over and above focusing on non-traditional ways of delivering such courses. Using

various methods, the elderly's perception of educational roles should be enlarged as a mechanism to get the elderly involved in educational activities.

#### Limitations to the Study

Several limitations will be presented relative to the methods used in this study.

1. The main limiting factor of this study was the measurement of anticipated behavior rather than actual behavior. Many unforeseen factors may come into play even for those who responded as definite participators.

2. The sample of this study was drawn from the Dakota State College service area, therefore, generalizing to other institutions of higher education and their service areas is rather dangerous.

3. The course offerings used in the questionnaire were those of Dakota State College and it was a small selection of the total possible. Had other course offerings been mentioned or another college or university used its offerings the results might be different.

#### Recommendations for Further Study

The following are some suggested areas for further study:

1. The theoretical perspective of continuity explained little of the anticipated participation of the elderly in educational activities in this study, it may be necessary to recast this perspective. Since this study did not examine all role possibilities, other roles may be important in maintaining role continuity for the elderly.

2. Organizational membership, past and present, did explain some of the variation in anticipated participation of the elderly in educational activities. Perhaps the investigation of the ways in which organizations influence anticipated educational behavior would be beneficial especially in discovering how to use these organizations to foster interest in Dakota State College.

3. Conceptually, socioeconomic status was not addressed by this study. The inquiry as to the effect of this concept could further explain the elderly's anticipated participation in educational activities. This is important in light of the fact that cost of course offerings was one of the few conditions that had some effect on the elderly's decision to take a course.

4. Since the population of this study only included those people up to age seventy, it would be worthwhile to investigate how those over seventy years of age anticipate participation.

5. Generally, the conditions under which courses might be offered did not effect the respondent's anticipated participation. In the section on implications of this study, it was suggested that an information system concerning course offerings be developed. The question then arises as to what type of information system, and what are the mechanisms necessary for this system to adequately function?



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## APPENDIX I

## THE INTERVIEW SCHEDULE

## STUDY ON ANTICIPATED PARTICIPATION IN EDUCATIONAL ACTIVITIES

Date \_\_\_\_\_ County Code \_\_\_\_\_

Interviewee \_\_\_\_\_ City Code \_\_\_\_\_

Address \_\_\_\_\_ Interviewer \_\_\_\_\_

City \_\_\_\_\_ Sex (1) Male (2) Female \_\_\_\_\_

Hello. My name is \_\_\_\_\_. I am doing research for the College and the South Dakota Board of Regents. You \_\_\_\_\_ have been selected by our computer to be interviewed for this study and the answers you give to questions will be confidential. I need about thirty minutes of your time. I would like to interview you now, or if not convenient, make an appointment to visit with you later on today.

\*\*\*\*\*

The first few questions are about your friends and family. Here is a purple card, please select the response that best reflects the extent to which you agree or disagree with the following statements:

1. I have as many friends as I did five years ago. \_\_\_\_\_  
(1)
2. I enjoy entertaining my friends. \_\_\_\_\_  
(2)
3. It gets tiring when I entertain my friends too often. \_\_\_\_\_  
(3)
4. I go out with my friends as often as I like. \_\_\_\_\_  
(4)
5. I see my children often enough. \_\_\_\_\_  
(5)
6. I do not feel up to the extra effort when my children visit me. \_\_\_\_\_  
(6)
7. When my family include me in their plans, I enjoy it. \_\_\_\_\_  
(7)
8. How many times in the last week have you had some contact with members of your family? \_\_\_\_\_  
(8)

9. Now back to friends, how would you classify most of your friends as to retirement:

- a. working full time?
- b. retired, but working part-time?
- c. retired?

\_\_\_\_\_  
(9)

Different people think education is for different purposes. The next several statements is a list of some of these purposes. Please select the response from the purple card that best reflects the extent to which you agree or disagree with these reasons.

10. Education is a life-time process, both inside and outside the classroom.

\_\_\_\_\_  
(10)

11. Education is appropriate only when job or career-oriented.

\_\_\_\_\_  
(11)

12. Education is only for those in the traditional age.

\_\_\_\_\_  
(12)

13. Education is for increasing the enjoyment of life.

\_\_\_\_\_  
(13)

14. It's very important that people continue to learn as they get older.

\_\_\_\_\_  
(14)

15. Going back to school is a good way to make use of my time.

\_\_\_\_\_  
(15)

The next few questions deal with experiences you have had with learning in the past.

16. How many meetings with an educational focus have you attended in the last year?

\_\_\_\_\_  
(16-17)

17. How many of these meetings have been sponsored by:

a. A Bible study or church?

\_\_\_\_\_  
(18)

b. A college?

\_\_\_\_\_  
(19)

c. Agricultural Extension Office?

\_\_\_\_\_  
(20)

- d. Senior Citizens Center? \_\_\_\_\_ (21)
- e. South Dakota Committee on the Humanities? \_\_\_\_\_ (22)
- f. South Dakota Arts Council? \_\_\_\_\_ (23)
- g. Other (please specify) \_\_\_\_\_ (24)

18. Looking back over your educational experiences how would you describe your experience? \_\_\_\_\_ (25)
19. In the past, when you started a new activity, how did you learn to go about it?
- a. jump in and start doing it
  - b. learn from watching someone else do it
  - c. talk to someone who knew how to do it
  - d. read about it and then tried it
  - e. a little of all of these \_\_\_\_\_ (26)

The following are statements about why people go to school or take a class. We would like to know to what extent you agree or disagree with them. Please respond again using the purple card.

20. I mainly want to learn more so I can contribute better to society. \_\_\_\_\_ (27)
21. I like to take classes so I can share knowledge with my friends. \_\_\_\_\_ (28)
22. I think the only reason for going to school is learning reading and study skills. \_\_\_\_\_ (29)
23. I learn as much from people who attend classes as I learn from the class. \_\_\_\_\_ (30)



Assuming no barriers (such as health, transportation, finances, or time) to what extent do you feel you would participate in the following educational programs or classes in the future? Please respond from the black card.

- |  |                     |
|--|---------------------|
| 24. A geography class such as Geography of South Dakota.   | .....<br>_____ (31) |
| 25. A course that studied people as individuals.   | .....<br>_____ (32) |
| 26. A course that studied people in groups and society.  | .....<br>_____ (33) |
| 27. History of civilization.   | .....<br>_____ (34) |
| 28. History of South Dakota.   | .....<br>_____ (35) |
| 29. American Government.   | .....<br>_____ (36) |
| 30. State and Local Government.  | .....<br>_____ (37) |
| 31. International Politics.  | .....<br>_____ (38) |
| 32. English or Literature.   | .....<br>_____ (39) |
| 33. Drama.   | .....<br>_____ (40) |
| 34. Painting or Jewelry Making.  | .....<br>_____ (41) |
| 35. A foreign language.  | .....<br>_____ (42) |
| 36. Introduction to Journalism.  | .....<br>_____ (43) |
| 37. Television and Film Arts.  | .....<br>_____ (44) |
| 38. Music.   | .....<br>_____ (45) |
| 39. General Metals and Woodworking.  | .....<br>_____ (46) |
| 40. Welding.   | .....<br>_____ (47) |
| 41. Crafts.  | .....<br>_____ (48) |
| 42. Health and Physical Education such as personal health, community health, physical fitness, social dance, and recreational games. | .....<br>_____ (49) |

- |   |                     |
|---|---------------------|
| 43. Math/Science such as introduction to computers, consumer math, medical terminology, chemistry, biology, physical science, physics, and conservation principles. | .....<br>_____ (50) |
| 44. A course in Business or Business Management.  | .....<br>_____ (51) |
| 45. Principles of Insurance.  | .....<br>_____ (52) |
| 46. Retirement Planning.  | .....<br>_____ (53) |
| 47. Estate Planning.  | .....<br>_____ (54) |

Now here is an orange card. If you were to enroll in one of the courses discussed in the last section, what effect would any of the following have on your decision? Respond according to the orange card.

- |   |                     |
|---|---------------------|
| 48. The course is offered for credit.               | .....<br>_____ (55) |
| 49. The course is offered for non-credit.           | .....<br>_____ (56) |
| 50. The course is offered on DSC's campus.          | .....<br>_____ (57) |
| 51. The course is offered in my community.          | .....<br>_____ (58) |
| 52. The proper way to go about enrolling.           | .....<br>_____ (59) |
| 53. The cost.                                       | .....<br>_____ (60) |
| 54. The tests that would be given.                  | .....<br>_____ (61) |
| 55. If there were discussions rather than tests.    | .....<br>_____ (62) |
| 56. The course is offered for the regular 16 weeks. | .....<br>_____ (63) |
| 57. The course is offered for a month or less.      | .....<br>_____ (64) |
| 58. The course is offered in the Fall.              | .....<br>_____ (65) |
| 59. The course is offered in the Winter.            | .....<br>_____ (66) |
| 60. The course is offered in the Spring.            | .....<br>_____ (67) |
| 61. The course is offered in the Summer.            | .....<br>_____ (68) |

62. Students are of all ages.
63. Students are people my own age.
64. The requirement of attending class.

(69)

(70)

(71)

People during their free time participate in many kinds of activities. We would like to know what kinds of leisure time activities you have done in the last year. The following is a list of activities. Turn to the green card and tell me how often you do the following things:

65. Amateur dramatics.
66. Art work (individual).
67. Book reading for pleasure.
68. Dancing.
69. Going to fairs and exhibitions.
70. Indoor team recreation (table games).
71. Indoor individual recreation (bowling, pool).
72. Watch television.
73. Literary writing (poetry, essays, stories, etc.)
74. Magazine reading (for pleasure).
75. Newspaper reading.
76. Outdoor individual sports (golf, fishing, hunting, etc.)
77. Outdoor team sports (trap shooting, volleyball, etc.).
78. Attend a symphony or band concerts.
79. Go to see a play performed.
80. Use the public library.

(1)

(2)

(3)

(4)

(5)

(6)

(7)

(8)

(9)

(10)

(11)

(12)

(13)

(14)

(15)

(16)

81. Visit museums and art galleries.

(17)

82. Special hobbies (stamps, photography, shop work, gardening).

(18)

The next section deals with the different organizations you have belonged to in the past. First we would like to know:

83. What organizations have you belonged to in the past? This does not necessarily mean only those you presently belong to but others that you have belonged to over the years?

List	In which did you attend meetings in the last year?	Are you a present member?
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
TOTAL: (18-19)	TOTAL: (20-21)	TOTAL: (22-23)

84. In a week, how often do you get telephone calls from people who just want to visit?

(24-25)

People have different reasons for sharing in educational programs. The following statements reflect some of these. Turn again to the purple card to give your answer.

85. I receive as much or more pleasure from the attainment in completion of an educational program or course as from participation in the activities.

(26)

86. I participate in educational activities to accomplish purposes for which I stand.

.....  
\_\_\_\_\_  
(27)

87. Participation in educational activities allows me to let myself go and have some real fun.

.....  
\_\_\_\_\_  
(28)

88. One reason why I would seek educational programs is to bring about improvements I consider desirable.

.....  
\_\_\_\_\_  
(29)

89. I like to take part in educational programs just to learn something new.

.....  
\_\_\_\_\_  
(30)

90. An important result of getting more education is to increase personal competence.

.....  
\_\_\_\_\_  
(31)

Finally we like to ask some questions about you.

91. During the last six months, how many days have you been sick?

.....  
\_\_\_\_\_  
(31-34)

92. How many times have you been to the doctor in the last six months?

.....  
\_\_\_\_\_  
(35-36)

93. Looking at the red card, how would you rate your health?

.....  
\_\_\_\_\_  
(37)

94. How old were you on your last birthday?

.....  
\_\_\_\_\_  
(38-39)

95. What is your marital status? Are you:

1. widowed?

2. married?

3. divorced?

4. never married?

.....  
\_\_\_\_\_  
(40)

96. For how long?

.....  
\_\_\_\_\_  
(41-42)

97. How many years have you attended school?

.....  
\_\_\_\_\_  
(43-44)

98. What is your work status right now? Are you:

1. Working full time?
2. Working part-time?
3. Working around the house?
4. Not working?

.....  
\_\_\_\_\_  
(45)

99. Do you consider yourself retired?

1. Yes
2. No

.....  
\_\_\_\_\_  
(46)

100. What do (did) you consider to be your occupation? .....

\_\_\_\_\_  
(47)

101. How adequate do you consider your income to be?

1. Not enough?
2. Barely enough?
3. Enough?
4. More than enough?

.....  
\_\_\_\_\_  
(48)

102. Which amounts listed on the white card best represents the amount of money you lived on last? .....

\_\_\_\_\_  
(49)

Thank you for your time and cooperation. Your answers will be held in confidence as you have helped us a great deal.

## APPENDIX II

SUM OF SQUARES, PROPORTION OF EXPLAINED  
VARIANCE, CUMMULATIVE PROPORTION OF  
EXPLAINED VARIANCE, REGRESSION COEFFICIENT,  
AND Y INTERCEPT OF THE INDEPENDENT  
VARIABLES AS ENTERED INTO THE  
REGRESSION EQUATION

SUM OF SQUARES, PROPORTION OF EXPLAINED  
VARIANCE, CUMULATIVE PROPORTION OF  
EXPLAINED VARIANCE, REGRESSION COEFFICIENT,  
AND Y INTERCEPT OF THE INDEPENDENT  
VARIABLES AS ENTERED INTO THE  
REGRESSION EQUATION

VARIABLE NUMBER	SUM OF SQUARES	PROPORTION OF VARIATION	CUMULATIVE PROPORTION OF VARIATION	REGRESSION COEFFICIENT	Y INTERCEPT
X <sub>17</sub>	7952.71166	0.47555	0.47555	0.47555	-23.66965
X <sub>14</sub>	11062.19291	0.22615	0.56087	0.34423	
X <sub>15</sub>	12331.28805	0.03609	0.59217	0.35544	
X <sub>3</sub>	13184.75098	0.02427	0.61232	0.33219	
X <sub>16</sub>	13870.56118	0.01950	0.62804	0.34953	
X <sub>13</sub>	14400.03105	0.01506	0.63991	0.38219	
X <sub>7</sub>	14827.61372	0.01216	0.64935	0.13203	
X <sub>12</sub>	15162.34743	0.00952	0.65663	0.30303	
X <sub>1</sub>	15396.41415	0.00666	0.66168	0.09078	
X <sub>2</sub>	15543.38520	0.00418	0.66483	0.05929	
X <sub>10</sub>	15666.55959	0.00350	0.66746	-0.01603	
X <sub>11</sub>	15744.81981	0.00223	0.66913	-0.08412	
X <sub>5</sub>	15839.09590	0.00268	0.67113	0.02138	
X <sub>6</sub>	15866.66680	0.00078	0.67171	0.01306	
X <sub>9</sub>	15878.07312	0.00032	0.67195	-0.07440	
X <sub>4</sub>	15887.04096	0.00026	0.67214	-0.01017	
X <sub>18</sub>	15892.12796	0.00017	0.67227	0.04901	
X <sub>8</sub>	15905.58440	0.00035	0.67254	0.02667	