

PSYCHO-SOCIAL CONCOMITANTS OF MOTIVATIONAL ORIENTATION  
IN A GROUP OF OLDER ADULT EDUCATION PARTICIPANTS

by

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## ABSTRACT

The purpose of this study was to show that, in the case of older adults, motives for participation in adult education are related to certain psycho-social characteristics associated with the later years.

Following retirement, adults face the loss of a number of roles. Ways of adapting to loss or change must be sought. Planners of adult education programs for older people should be aware of changes taking place in the older person, and create learning environments which facilitate adaptation to old age. To this end, a study of motives and their concomitant needs was conducted with a population of 118 retired people residing in Greater Vancouver. The study attempted to reveal a relationship between one motive for participation in adult education (Escape/Stimulation) and participants' levels of life satisfaction, adjustment to developmental tasks of later life and social participation.

Boshier's (1976a) Education Participation Scale was employed to measure motives for participation. Responses from the scale were factor analyzed and orthogonally rotated to produce four "orientations"--Escape/Stimulation, Social Welfare, Social Contact and Cognitive Interest. Factor scores were correlated with relevant demographic data and the three measures of psycho-social characteristics. Respondents motivated to attend for Escape/Stimulation manifested low levels of life satisfaction, adjustment to developmental tasks of later life and social participation. These respondents also tended to have a lower educational background and previous job level than those who were not motivated by Escape/Stimulation motives.

Boshier (1971, 1976, 1976a) and Haag (1976) analyzed motives for participation and claimed a relationship exists between these motives and Maslow's growth/deficiency model. They see the Escape/Stimulation factor as being indicative of deficiency motivation. The present study has added validity to theorizing undertaken in previous research by indicating that, amongst older adults, the Escape/Stimulation factor is related to deficiencies in life satisfaction, adjustment and social participation.

It is contended that courses presently offered by institutions for the older adult are not meeting the special needs of the clientele. If motives for participation are measured, the resulting information can aid the planner in designing a compatible learning environment for the older person.

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## CHAPTER I

### INTRODUCTION

#### A. The Problem

Older adults who have retired from the work force have been recently recognized as a group of clients for adult education programs. Their motives for participating in such programs are frequently connected with the fact that, upon retirement, they have been relegated to a minor role in society. Various institutions have undertaken programs to help retired people overcome feelings of alienation and uselessness which many older people express (Sarvis, 1973; Knox 1968). All too often, however, program planners neglect the specific social, psychological and physiological needs of older people and concentrate instead on superficial activities: bingo, card games, carpet bowling, random "field trips", and the like. As Bagger observes:

Many of the colleges are interested in offering 'continuing education' to older adults. But none of the courses they plan are designed to undertake the work of preparing these older adults to work toward the social changes that the more aware and resentful old people wish and need to accomplish for themselves and for the on-coming generations. (1975, p. 7)

If educational activities for the elderly were conceived with due regard for the group's real needs and characteristics, these activities might centre more on helping the retired person to deal with his situation, and, ultimately, to bring about some changes by his own design.

The process of determining program objectives for the older adult is complex. It will generally involve an analysis of the total

learning environment, and a detailed knowledge of the psycho-social characteristics of elderly people. Some information is available in sources such as socio-demographic studies and institutional reports, but information about basic needs and their relation to motives for participation in a particular program is less accessible. Analyses of psycho-social characteristics of adults as they relate to motives for participation have only recently been seen as relevant to the adult educator. More data must be collected so the importance of such studies for all age groups may be assessed.

#### B. Purpose of the Study

A critical appraisal of motives for participation must take account of the clients' own expression of reasons for participating in a program, but should avoid a facile identification of motives with interests in a specific course content. Recent analyses suggest motives are systematically related to needs and other characteristics of particular groups. Boshier and Peters argue that:

Motives for participation appear to be surface manifestations of psychological states which are in turn related to developmental tasks and psycho-social conditions that characterize various age and socio-economic groups. (1976)

If true, this furnishes the program planner with the key element of a proper theoretical model. The purpose of the present study was to test the contention as it applies to the recognizable "age and socio-economic group" of older adults.

Older adults face a number of unique problems. Exit from the work force, death of a spouse, displacement from the family home or any

number of other unsettling events can give rise to needs. The need may, for example, be to socialize with peer group members, or to learn a new hobby to pursue during leisure time. Ultimately, the retired person may be motivated to minimize unrest by reacting to the situation. He may join a club, take up an individual pursuit or attend courses to meet the need.

Motivational orientation researchers (e.g. Boshier, 1971; Burgess, 1971; Morstain & Smart, 1974) have identified several clusters of reasons apparently reflecting needs which impel people to participate in adult education. These orientations (and their concomitant needs) are age-related. Of particular relevance to older adults is an "Escape/Stimulation" factor which is assumed to be related to needs that are critical to all people but particularly dominant amongst older adults. In previous motivational orientation studies the factor Escape/Stimulation has been composed of items such as "To get relief from boredom", "To stop myself becoming a vegetable", and other items which represent both the high and low ends of the engagement . . . disengagement continuum that dominates the social gerontology literature. The special relevance of Escape/Stimulation to the population chosen for this study provided the major focus for the analysis which follows.

The study involved a population of retired people participating in educational programs, and focused on the particular needs they share because of their position in the life cycle and society. An attempt was made to measure motives for participation in adult education, and to ascertain the degree to which these motives were related to certain

measurable psycho-social characteristics of the older adult: social participation, satisfaction in the later years, and adjustment to the developmental tasks of later life as well as the usual mediating variables such as sex, age, and previous occupation.

### C. Propositions for Research

This study investigated the correlational relationship between participation for Escape/Stimulation reasons and certain psycho-social characteristics which may be peculiar to the older adult.

The major propositions are that:

1. Escape/Stimulation correlates with life satisfaction in the older person;
2. Escape/Stimulation correlates with developmental tasks of later life;
3. Escape/Stimulation correlates with social participation in the older adult.

### D. Clarification of Terms used in this Study

The following terms are used and require definition.

#### 1. Adult Education in the formal instructional setting:

This setting comes into being ". . . when an educational agent designs a sequence of tasks using specific learning procedures to help an adult achieve a mutually agreeable learning objective!" (Verner & Booth, 1964, p. 17).

#### 2. Older adult, retired person, senior citizen:

Any person, aged 55 or older who has retired from the work force,

or who works in the home, but whose spouse, if living, has retired from the work force.

3. Need:

A psychological or physiological gap between what exists now, and some desired condition--an imbalance, or lack of homeostasis. Needs reflect the immediate situation of the adult and help determine motives.

4. Motivation:

An inner state which is in part acquired or learned. Characterized by arousal of energy, effort towards accomplishing a goal, persistence until conditions change.

E. Plan of the Study

Chapter I provides an introduction to the problem and states the propositions to be tested. Chapter II reviews the literature regarding the characteristics of older adults as they relate to the community, adult education, and needs which may arise as a result of retirement and old age. Studies analyzing both superficial and in-depth ways of determining needs and motivation of participants are discussed. The review concludes with an overview of motivational orientation research.

Chapter III, Instrument Development, discusses the four aspects of the questionnaire, namely, socio-demographic data, Education Participation Scale, Social Participation Scale, Life Satisfaction Index, and Adjustment to Developmental Tasks Scale. Reliability of all measures is discussed. Population of the survey, data collection and data analysis plan are included in Chapter IV. Results of the study appear in Chapter V, while discussion, conclusions and implications appear in Chapter VI.

## CHAPTER II

### REVIEW OF THE RELATED LITERATURE

The literature suggests that a relationship exists between some unique characteristics of the older adult, and motivation for participating in adult education. The organization of the literature review is shown in Figure 1, and reflects the problem identified in this study:

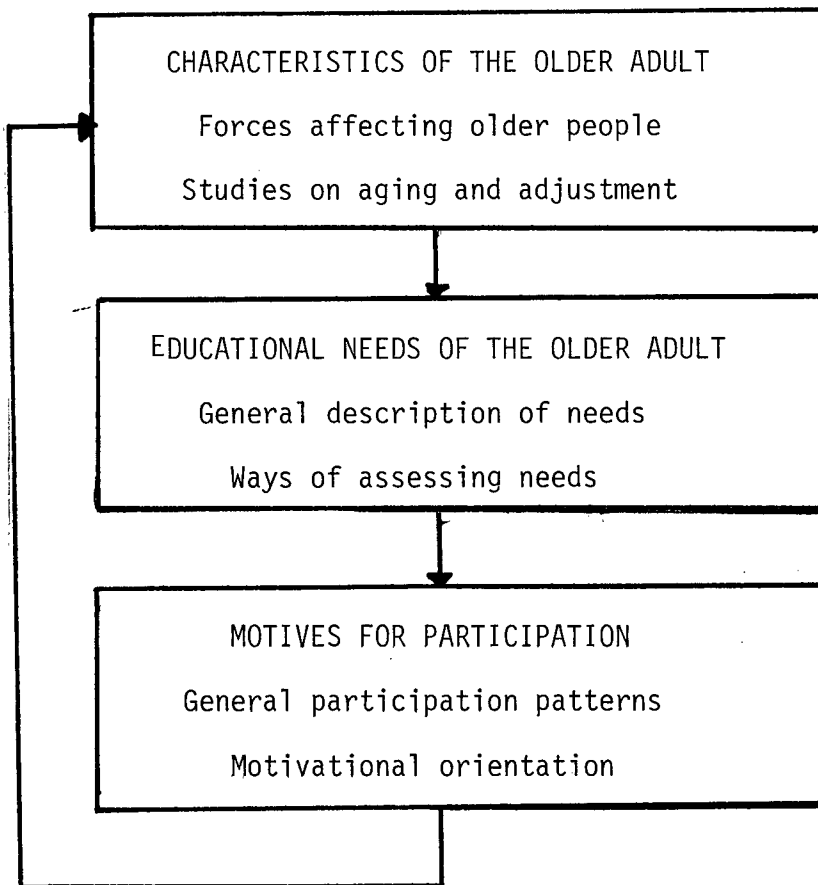


Figure 1. Hypothesized inter-relationships which provided a framework for the organization of this study



The characteristics of the learner, his needs and motivation for participation are assumed to complement each other (Douglass, 1970). Motives and needs of adult education participants do not exist in isolation, but are related to other aspects of the individual. For example, Boshier indicates that ". . . motivational orientations are meaningfully related to other social and psychological variables" (1976a, p. 10).

The chapter examines forces in the older adult which may result in needs and concomitant motives which impel older adults to participate. As well, a brief review of five theories of aging is presented, which discusses research conducted by gerontologists about the characteristics and needs of later adulthood. "Needs" and ways of assessing them are discussed. Studies of participation and motivational orientation place the focus of needs assessment on psycho-social characteristics, rather than the interests of the adult.

#### A. Characteristics of the Older Adult Participant

##### 1. Three forces influencing the older adult

###### Social forces

A retired person has lived through profound social and technological changes. Two world wars, a major depression, and the acceptance of machines as a major component in modern life have forced the person over sixty to adapt to ever-changing situations. The individual must become used to a fluid, mobile population base with emphasis on urban, rather than rural dwellings. Each option the adult chooses involves a learning situation. As Knox notes:

For good or ill, the rapid rate of social change is the dominant force producing an increased societal requirement for more and better adult education. (1968, p. 6)

Modern North American culture values youth. A retired person serves no real purpose to the community, and is often given segregated housing, and "busy-work" to command attention until death. As Cowgill notes:

A value system which emphasizes ego development and individualistic achievement places the older person at a disadvantage as compared with a value system which submerges the individual in the group which in turn provides security for dependent or incapacitated members. (1972, p. 12)

Older adults must identify with a community which supports them financially, but tends to reject them socially and largely excludes them from the power structure. The acceptance and inclusion of older adults at the community level varies from rural to urban populations, size of retired population, and with whoever wields political power at the moment.

#### Psychological forces

Role changes caused by aging and forced retirement may give rise to needs. Loss of employment and business friends may cause loneliness for a career person, while someone who has spent thirty years in the home may resent the sudden intrusion of a newly-retired spouse.

Diminished income, grown children leaving home, and the pressures of moving to smaller living quarters all create conflicts in older adults.

#### Physiological forces

Perhaps one of the most difficult requirements of the older adult

is the choice of accepting and adapting to increased frailty and ill health in later years. Because of medical advances however, a person lives many more years than did any of his forefathers. This longer period of life, coupled with reductions in retirement age reveals another problem peculiar to the older adult--constructive use of up to 30 years of leisure time.

## 2. Studies on aging and adjustment to the later years

The social, psychological and physiological forces acting upon older adults cause them to react in a variety of ways. The following studies analyzed some of these reactions, and in some cases nurtured theories which provide a framework from which to look at the unique characteristics of the older adult.

Many theories of and ideas about changes which occur in later life have been published during the past fifteen years. Prior to 1960, almost no work had been done in the area, with the exception of Havighurst (1948) and others at the University of Chicago. Cumming and Henry (1961) published their theory of disengagement, which had grown out of the Kansas City Study of Adult Life. During the same period, results which challenged this theory were published, using the identical population (Neugarten, et al, 1961). The concentrated activities which produced two important theories of aging have been followed by a large number of dissenting journal articles and other publications. Not all the dissenters have introduced new theories, nor even offered alternatives. Some have conducted their own research which purports to invalidate previous research. Little effort has been made to replicate existing research.

## Disengagement and activity theories

In their book, Growing Old: the Process of Disengagement Cumming and Henry (1961) cite findings from the Kansas City Study of Adult Life to argue that social and psychological withdrawal is normal and inevitable for older adults. Both society and the aging individuals want this withdrawal to occur; it is said to be a correlate of successful aging. Older adults are said to become passive, preoccupied with themselves and will cease to function normally in society. This theory has been criticized from many points of view by researchers who claim that disengagement, if it exists, affects only a small minority of the older population (Back & Gergen, 1966).

Arguing against the disengagement theory, Cavan et al., (1949), and Palmore (1968), feel that society allows only one major role for older adults; that of "retired person". The authors advocate activity, rather than passivity, with older adults joining organizations, learning skills and participating fully in society.

## Role theory and the aged as a subculture

Using role theory and group identification, Rose (1968), claims his ideas parallel but do not necessarily oppose those of disengagement theorists. Since North American society is age-graded, sub-cultures flourish (Eisenstadt, 1956). This is particularly true for the modern retired person, who may live a healthy long life, and tends to reside in a retirement community or own home rather than with children. Any disengagement which takes place is created by a society which denies him jobs, leadership roles and other active positions.

Although a retired person may lose many functions such as breadwinner, homeowner, head of household, it is possible for that person to assume new and challenging roles (Blau, 1973). These roles must not include "make work" tasks which help to pass time. Rather, old people should begin to brush up forgotten skills through Adult Basic Education, vocational training, and other areas which will re-introduce them to problem-solving and self-discipline (Bultena & Oyler, 1971). Depending on a wide variety of social, economic, health and personality factors, older adults vary in their approach to old age and should be encouraged to develop those commitments and roles which satisfy them.

#### Developmental, or Life Cycle theory

Life cycle is defined as those stages of an individual's life, during which developmental crises will occur (Erikson, 1968). The individual will either cope or fail to cope with the situation. Life cycle theorists consider that needs depend upon the history and personality of each person. Later stages of the cycle are characterized by a more restricted life space in such areas as income and family relations. Such problems coupled with inevitable physical decline may cause threat and anxiety and often "planlessness and resignation" (Pressey & Kuhlen, 1957, p. 296). By studying the life cycle, social scientists can contribute to the adjustment and coping behaviours of the older person (Youmans, 1969). Life cycle theory also emphasizes the differences between those retiring now and those who have been retired many years. The "younger" group has fewer children, higher income, and better education than the "older" group and has already begun to make greater

demands on society for activity centres, retirement villages and educational opportunities (Cain, 1967).

Havighurst advocates the life-cycle or developmental theory approach. He is concerned with developmental tasks accomplished during the whole life cycle, including the later years, and codified dominant roles of progressively aging adults (1948, 1964). Each role becomes a developmental task, which often must be adjusted to or accomplished in a very short time. Retirement, for example, makes demands of rapid adjustment necessary for the person whose employment has recently terminated. Needs arising out of the task of adjusting to retirement are not presently being met, either by business or by adult educators.

The final two stages of life, age 60 to 70 and age 70 to 90, tend to occur during and after the retirement process. During the first time period, the older adult must plan for role changes, by considering his health, finances, adjusting to death of spouse, and other areas which comprise the developmental tasks of later life. Up to age 70, claims Havighurst, adult education might help to enhance the social situation and aid in adjustment to these early post-retirement developmental tasks.

Many of Havighurst's original developmental tasks are now out of date and must be adapted to suit social changes which have occurred during the past 20 years. However, the idea of portraying the life cycle as a series of tasks to be accomplished has been accepted by many social scientists and adult educators (Kurtz & Wolk, 1975).

## B. Educational Needs of the Older Adult

Studies conducted by gerontologists during the last fifteen years have revealed that some older people wish to remain aloof from society, while others wish to identify closely, either with their own age group or with the community at large. All of these people experience enforced leisure, certain tasks to which they must adapt, and a greater or lesser degree of satisfaction with life. Although "theories" are created and dissected regularly, some needs of older adults are not met by society.

### General description of educational needs

Much of the literature on "needs" for older adults is actually an analysis of interests. Hiemstra (1972), asks what the preferences of older people are, while Havighurst (1976) and Marcus (1972) see needs of older adults as being either expressive or instrumental in nature. McClusky (1971) defines four needs of older adults: coping, expressive, contributive and influence. Satisfaction of these needs can lead to maintenance of well-being and continued growth.

Needs can be described as an imbalance or gap between what is and what should be. They reflect a person's immediate situation and influence his motives. Thus needs are closely related to motives, but differ from interests, which are "acceptance or rejection of alternative modes of overt behaviour" (Knox, 1968). Needs have been variously typed. Leagans (1964) sees needs falling into physical, social or integrative categories, with both felt and unfelt needs existing in each category. Both community and individual needs must be considered when programming (McMahon, 1970;

Miller, 1967). Atwood and Ellis (1971) describe needs as either prescriptive or motivational. They claim that educators should consider needs from the point of view of life-span approaches, much like Havighurst and Maslow, where certain tasks must be completed at particular stages in life.

Maslow (1962) argues that basic needs are arranged in a hierarchy. As the lower order needs are satisfied, needs on the next level become important. For example, when basic needs such as hunger and thirst are satisfied, safety needs begin to take precedence. As needs on one level are satisfied, a residual state of tension, uncertainty or pain will result until the need on the next step is met.

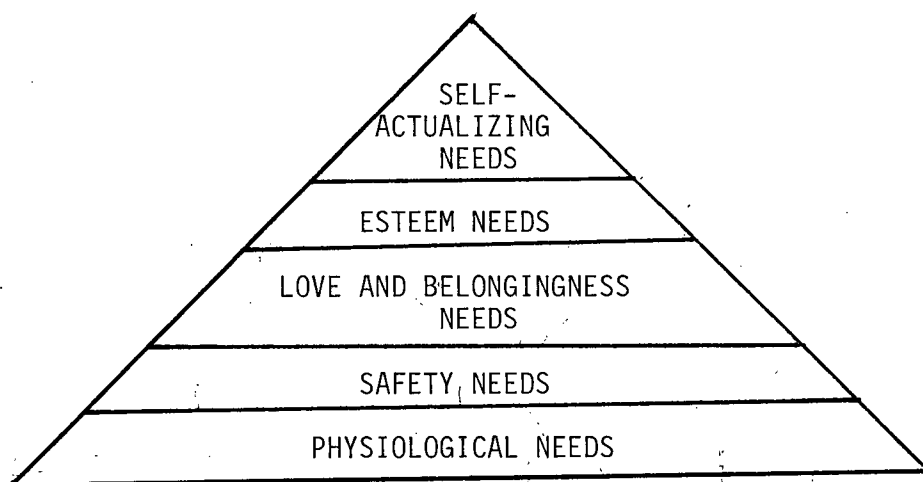


Figure 2. Maslow's Hierarchy of Needs

Two types of motivation are present in the individual, Maslow claims. "Deficiency motivation" is represented by an attempt to satisfy the lower order needs on the hierarchy, while "growth motivation" includes an attempt to realize self-actualization, which occurs after basic needs



have been satisfied. According to Maslow, few individuals attain this state of self-actualization, which comes only when all prior needs are satisfied, and the individual is no longer motivated for reasons of deficiency.

The adult educator should be aware that participants will reveal different levels of needs which must be met, and that according to Maslow, the lower order, or deficiency motivated needs must be dealt with very differently than needs which give rise to growth motivation.

#### Ways of determining needs

The programmer will be aware that certain needs are present in every individual. However, the problem of diagnosing needs and designing programs which will meet them, is a difficult task. Questions the programmer can ask before establishing program objectives are:

- a) Which programs are presently enjoyed or found to be useful by the clientele?
- b) How can socio-demographic characteristics of particular clientele be ascertained?
- c) What needs motivate the client to participate in adult education classes?
- d) How do the psychological and sociological characteristics of the clients affect their motivation to participate (this includes group norms, patterns of adjustment and participation, developmental task accomplishment, life cycle characteristics)?

It is important to determine the educational needs of an older population which undergoes "major and abrupt changes" (Knox, 1968) during retirement years. By simply asking respondents for demographic information and course choice the researcher or programmer fails to determine those needs which may ultimately motivate people to participate, and which should be considered when planning programs. It is important, therefore, to assess all levels of needs for this unique group of adults, and to assess them adequately. As Kauffmann states:

The identification of personal needs of older persons implies more than a listing of statements people make about something they don't have but want, about changing what they have for something else. A need may be defined as the recognized disparity between what is for what might be. This recognition might be in the stream of consciousness of an individual, but he might not be aware of it at all . . ." (1967; p. 16).

Again, the question arises, how can needs be measured and acted upon by the adult educator? Boshier and Peters (1976) feel that "many 'internal' determinants of participation such as needs and interests may be inferred once the educator knows the participants motives for participation."

### C. Motivation for Participation

Maslow argues that needs exist in a hierarchy, and that lower order deficit needs must be gratified before higher order, or growth needs emerge. The motivations of those with lower order needs is said to differ, as well. If, for example, the basic need for safety is not met, the individual will be insecure, and dissatisfied with his situation. The motives which grow out of this need would differ from the motives of

the self-actualized individual who is intent upon satisfying higher-order needs relating to his own potential for gaining knowledge, deepening interpersonal relationships, and so forth. The situation can be represented diagrammatically as follows (Figure 3):

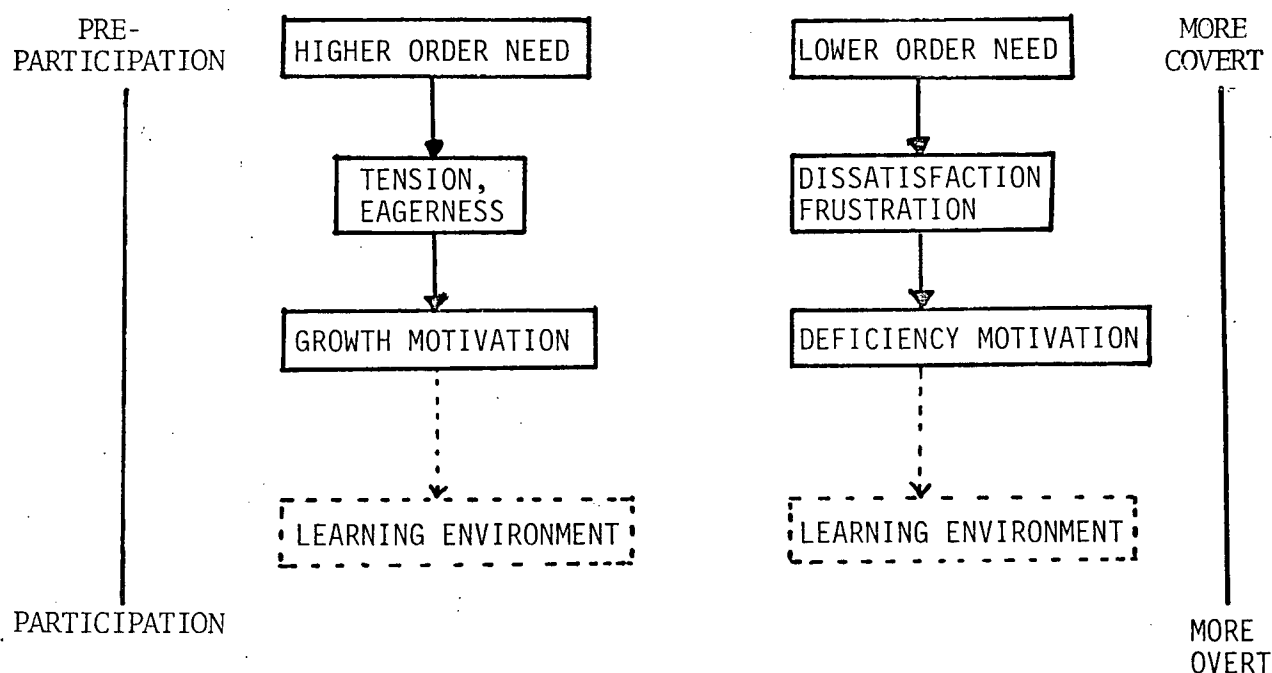


Figure 3. Hypothesized causes of motivation in the adult education participant.

Social forces, personality traits and other characteristics of an adult can give rise to either higher or lower-order needs. The state of eagerness or dissatisfaction which results causes the individual to be

motivated to act in some way. Higher-order needs give rise to growth motivation, while lower-order needs result in deficiency motivation. Boshier (1973) employed a congruence model and suggested that growth and deficiency motivation (operating prior to participation) also affect the behaviour of participants in adult education environments after the learning experience has commenced. In Figure 3, the dotted lines are used to suggest that effects resulting from the presence of deficiency and growth motivation (prior to participation) may pervade the instructional setting and perhaps influence learning, satisfaction and persistence. However, the present study does not concern the post-enrollment behaviour of participants.

The program planner who wants more psycho-social data on participants, is faced with a dilemma. Should needs be assessed in the hope that the educator can infer information on motivation for participation or should participation habits be analyzed, and needs inferred from this information? Thus far, the literature review has focused on the former category. This study hypothesized a relationship between motivation for participation and certain characteristics of the older adult. A review of the literature on participation in adult education follows.

#### General Participation Patterns

Bruner (1959) showed that there were two types of participation studies, those which analyze the characteristics of participants, and those attempting to ascertain differences between participants and non-participants. Participants in adult education tend to have a high

school or college background, be active in the community and have a middle class socio-economic status. Participation after age 50 generally decreases. Non-participants tend to have low-status jobs, less education, and a history of being 'non-joiners' (Wilensky, 1962). Conflicting data is available on decline in participation with age. Wilensky claimed a definite decline occurs after age 60; however, later research showed that the characteristics of older adults remain constant, and that activity depends on subjective factors and status within the life cycle (Videbeck & Knox, 1965).

Dickinson (1971) found that adults with a concept of lifelong learning and a history of participation in adult education, will attend courses more frequently than those who express little interest in life-long learning. A survey on the socio-cultural aspects of older adult education participants indicated in part, that they are generally in good health, live in their own homes, and have ongoing contact with educational activities (Robinson, 1972). They do not differ from older non-participants in terms of age, educational background and former job status. Another study of older adults showed a positive relationship between participation and life satisfaction if health and socio-economic status were not controlled. If these variables were controlled, the relationship was found to be insignificant (Bull & Aucoin, 1975).

#### Motivation Research

As early as 1961 adult educators were concerned with looking at participation in terms of developmental tasks, disengagement theory, and

adjustment to life (Knox & Videbeck, 1963; Knox & Sjogren, 1962). Houle (1961) argued that three "types" covered all reasons for participation in adult education activities. He claimed participants are either a) goal oriented, where education is used as a means of achieving clear objectives, b) activity oriented, where adults attend for reasons other than the content or purpose of the activity, or c) learning oriented, when knowledge is sought for its own sake. These types are not considered pure, since the adult participant may be motivated in more than one area at a given moment, but one orientation is said to be dominant.

Miller (1967) subsequently developed a way of analyzing participation in adult education activities. A needs hierarchy, he argues, only partially explains motivation. Social structures such as culture and kinship patterns are also related to motives. The basic needs combined with social forces will either cause or prevent participation in adult education. Another study investigates the possibility of using Maslow's self-actualization concepts to facilitate successful retirement through adult education participation. Older adults could be taught to meet change and frustration successfully (Keahey & Seaman, 1974). The authors encourage the use of personality inventories and other measures to determine needs.

#### D. Motivational Orientation

Since Houle's three-factor typology emerged, three instruments have been designed to measure 'learning' or 'motivational' orientations: the Continuing Learning Index (Sheffield, 1964); Reasons for Educational

Participation Scale (Burgess, 1971); and the Education Participation Scale (Boshier, 1971, 1976, 1976a). Houle's typology was used as a basis for creating items. Discussion of measurement and factor analysis of the above three scales will appear in Chapter III.

Using the Education Participation Scale, Boshier (1971) tested Houle's typology. Forty-eight reasons for participation were assembled, and the resulting scale was administered to 233 randomly selected New Zealand adult education participants. Responses were factor analyzed, with 14 factors emerging. Boshier introduced the notion of Maslow's growth/deficiency motivation theory here, claiming that its relevance to adult education ought to be tested on extreme groups of participants. He argued that participation stems from motives which are more complex than those originally identified by Houle.

Boshier (1976a) attempted to depict participants as either "life-chance" (deficiency) or "life-space" (growth) motivated. A minority of the population is composed of life-space people, who are independent, tolerant and moving towards self-actualization. Life-chance motivated adults are purported to be fulfilling the lower order needs on Maslow's hierarchy (physical, safety, dependence) and must satisfy external expectations as well as internal needs.

Boshier's investigations confirm that younger people tend to be more "life-chance" oriented than older participants, and that "life-space" motivated people are in a higher socio-economic bracket than are "life-chance" participants. He concludes that people in different age and social groups enroll for reasons related to psycho-social events which determine behaviour. In the case of older adults, the events might

be retirement, which is accompanied by loss of income, status, and social life. One of the participation factors to emerge in Boshier's study was Escape/Stimulation. Haag's (1976) study corroborated the same factor.

The Escape/Stimulation factor of Boshier's Education Participation Scale was selected for use in this study, since it was felt that many older adults would participate to satisfy deficiency, or lower order needs. Older adults undergo rapid role change involving large-scale adjustments to loneliness, ill health, strained finances and the knowledge they are less useful to society than when they worked and headed family groups. The hypotheses in this study, then, focus on the Escape/Stimulation factor of the Education Participation Scale as being most relevant to the program planner who must take into consideration all the changes occurring in the older adult during post-retirement years.

Haag (1976), using Boshier's E.P.S., hypothesized growth and deficiency motivations as being related to: a) continuous or sporadic participation in adult education, and b) to age (or stage in the life cycle) and socio-economic status. His results indicate that growth-motivated participants tend to be continuous learners, somewhat older and of higher socio-economic status than deficiency motivated respondents. Deficiency-motivated participants are younger, more sporadic learners and of lower socio-economic status than growth-motivated participants.

Boshier suggests that life chance and life space motivation are opposite ends of a single continuum. He allowed for the fact that the



continuum may cut across motivational orientations in an orthogonal or oblique manner. He suggests that the assignation of "chance" and "space" labels to E.P.S. factors is tenuous, but in view of the fact Haag found significant correlations between measures of self-actualization and the Education Participation Scale factor scores, Boshier has tentatively suggested the relationship is lineal.

All of the preceding studies of motivational orientation are cross-sectional, and the results tend to apply to those adults who participate in adult education at institutions sponsoring adult education courses. Therefore, unlike the respondents in the present study, the age of participants seldom rises above 45 or 50.

### Summary

Several forces act upon older adults, causing needs to arise. The needs may be resolved or ignored, depending on the individual. A person can "disengage" and refuse to have contact with the community or alternatively, may become involved in the community in a number of ways. One of the ways the person may become involved is by participating in adult education courses. However, the older adult's motives, or reasons for attending will differ with the individual, depending on background, state of health, and other variables. It is important to ascertain motives for participation, which in turn reflect the more basic needs so that the learning environment can meet those individual needs. One way of helping to determine motives is by ascertaining the motivational orientation of adult education participants, and correlating these orientations with psycho-social characteristics of the adult participant.

### CHAPTER III

#### INSTRUMENT SELECTION AND DEVELOPMENT

##### A. Introduction

The preceding literature review indicates that program planners should gather data about motives for participation and acknowledge that motives are related to other aspects of the participant's life. This study attempts to contribute to a body of knowledge pertaining to characteristics, needs and motivation of the older adult participant. It is hypothesized that a relationship exists between Escape/Stimulation, and three other characteristics of the older adult: satisfaction in the later years, adjustment to developmental tasks of later years, and social participation of the retired person. Instruments measuring motives for participation and the above characteristics were obtained, and a correlational study conducted.

Boshier's (1976a) Education Participation Scale was employed to measure motives for participation. One of the factors to emerge was enrollment for Escape/Stimulation reasons.

Measures of some psycho-social characteristics or aspects which relate specifically to the older adult were obtained through the use of three instruments:

1. Life Satisfaction Index - A (LSI-A)
2. Developmental Tasks of Later Life Scale
3. Social Participation Scale

The Life Satisfaction Index - A (Neugarten et al., 1961) has been used extensively to measure contentment with life in later years. An instrument

developed by Kurtz & Wolk (1975) to measure Havighurst's developmental tasks of later life was also employed in this study. A measure of social participation in the older adult was designed and pre-tested.

Socio-demographic data were obtained for the population. Since motivational orientations in older adults have not previously been analyzed, it was felt that base-line information was necessary to this study. Marker variables such as age, sex and former occupation were included. Results of demographic data were correlated with scores on the above measures indicating characteristics of older adults, in order to determine significant relationships.

The main variables employed in this study were the four factors derived from the Education Participation Scale and scores obtained from the Life Satisfaction Index - A, Adjustment to Developmental Tasks of Later Years, and a measure of social participation. Their sequence in the questionnaire was as follows (Appendix B):

Page 1:	Socio-demographic data
Pages 2-4:	Education Participation Scale
Pages 5 & 6:	Social Participation Scale
Page 7:	Adjustment to Developmental Tasks
Page 8:	Life Satisfaction Index - A

#### B. Socio-demographic Data

The data were collected in order to provide information about characteristics of the group tested, and to ascertain whether any socio-demographic variables were significantly related to scores on the above-mentioned scales. The first four questions concerned sex, marital

status, date of birth and city of origin. Question five asked:

WHAT WAS YOUR OCCUPATION BEFORE RETIREMENT? (please be very specific about your former work - e.g. teacher in 7-teacher school, manager of a small trucking firm)

If you were a housewife for most of your adult life, please write in the word "housewife", and in brackets, give the specific title of the work you did before becoming a housewife.

---



---

Respondents were then asked how many years and months they had been retired, since 65 is no longer a definitive age for retirement.

"Educational qualifications" were established through use of a five-point scale:

WHAT IS YOUR HIGHEST EDUCATIONAL QUALIFICATION? (check only one box)

- no formal qualification
- completed elementary school
- grade 12 graduation or overseas equivalent
- post-secondary or trade qualification (e.g. vocational training, business diploma, etc.)
- university degree(s)

A six-choice item concerned housing arrangement. Respondents were asked whether they lived in their own home, with a relative, in an apartment block, a retired person's residence, boarding home, or "other". The "other" category proved unnecessary, since all answers fell within the previous five categories.

Respondents were asked to place the course name at the top of the questionnaire. These titles were later divided into four broad categories:

1. Verbal skills
2. Motor skills
3. Liberal arts
4. Adjustment to retirement

These categories were chosen subjectively after scrutinizing course offerings from several institutions offering programs for retired people. A complete list of courses and categories is provided in Table 3.

Status of former occupation (question 5) was coded in accordance with Blishen's (1967) analysis of Canadian Census data where occupations are ordered in accord with socio-economic status. The ranks were derived by Blishen through a regression analysis of income and education. Weights were assigned to each occupation and its mean rank calculated. For purposes of this study, the list of statuses was divided into nine categories, of which only the top seven were represented among the respondents. The first category included professionals, such as doctors and lawyers. Category two was represented by owners and managers of business, while the third category contained teachers, stenographers and athletes. Level four included foremen in industry, nurses and some clerical occupations, while the fifth category listed millwrights, inspectors and postmasters. Category six included sales clerks and stewards, while the seventh level contained bus drivers, mechanics and furniture makers. The eighth category listed tailors, taxi drivers; and laborers, janitors and cooks fell into the final category of Blishen's scale. These examples are only indicative of the type of occupations

listed on Blishen's more comprehensive scale.

As part of the same question respondents were asked to indicate whether or not they had been working within the home for most of their adult life. If they had spent most of their lives engaged in the work force, they were asked to state their former occupation. A category of "major employment" (in home or outside work force) was thus created.

### C. Education Participation Scale

The notion of measuring "motivational orientation" grew out of Houle's three-factor typology of goal, activity and learning orientation. Several scales were recently developed to measure motives (Boshier 1971, 1976a; Sheffield, 1964; Burgess, 1971).

Items are factor analyzed into clusters, which often have labels such as "Professional Advancement", or "Social Welfare". Each researcher used a different scale for the degree of influence of each item (Burgess: 7-point scale, Sheffield: 5-point scale, Boshier (1976a): 4-point scale). Burgess obtained a fifteen-factor solution, from which seven orientations were derived, while Sheffield and Boshier (1976a) obtained five and six factors respectively.

Sheffield's scale was used by Dickinson and Clark (1975), who extracted eight factors in a study of continuing education in the health sciences. Morstain and Smart (1974) attempted to replicate Boshier's (1971) study and used the Education Participation Scale. Results indicate that the E.P.S. can reflect the relative importance of different reasons for participation in adult education courses. Morstain and Smart's respondents were divided into three age groups. It was claimed that the need for "Social Contact" and "Social Welfare" declines

with age. For purposes of the present study, however, Morstain & Smart's age categories are too gross to be meaningful. The oldest group contained all respondents over the age of 41 years.

Boshier (1976a) argues that motivation changes with age. "life chance" and "life space" orientations change as participants complete developmental tasks associated with particular stages in the life cycle. Older adults, for example, would tend to participate less, as there would be no "Job Advancement" factor present to motivate them. Boshier's solution included six factors;

1. Escape/Stimulation--person participates to relieve boredom, remedy deficiency in social life.
2. Professional Advancement--person wants to facilitate job advancement.
3. Social Welfare--person wishes to acquire knowledge required to achieve social or community objective.
4. Social Contact--person wishes to meet new friends, improve social life.
5. External Expectations--person attends to carry out expectations of friend, social worker or other person.
6. Cognitive Interest--person attends for the pleasure of learning.

Recent factor analysis of the Education Participation Scale caused Boshier (1976a) to drop eight items from the 48-item scale, and to reduce the nine-point scale to four steps. A reliability study was conducted on the revised 40-item scale by Haag (1976). Mean test-retest

reliability coefficient for all items was .60, establishing reliability (n=42).

For purposes of the present study, five items were deleted from Boshier's scale. Each deleted item loaded in previous studies on the professional advancement factor, none is relevant to the life of a retired person. The five items dropped were:

1. to secure professional advancement
2. to give me higher status in my job
3. to escape the intellectual narrowness of my occupation
4. to increase my job competence
5. to meet formal requirements

Between 10 and 14 items were typed on each page of this questionnaire, with the "no influence" end of the scale alternating from left to right with each question (Appendix B), to help avoid response bias. Instructions and sample questions are as follows:

Please indicate below the extent to which each of the reasons listed below influenced you to participate in this course or program. Circle one category for each question.

Sometimes the "much influence" category is on the right-hand side of the page, sometimes it is on the left. No reason for enrolling is any more or less desirable than any other reason. Please be frank. There are no right or wrong answers.

- |     |   |                |                    |                    |                |
|-----|---|----------------|--------------------|--------------------|----------------|
| 23. | To provide a contrast to the rest of my life  | Much influence | Moderate influence | Little influence   | No influence   |
| 24. | To get a break in the routine of home or work | No influence   | Little influence   | Moderate influence | Much influence |

#### D. Life Satisfaction Index - A

This index was designed by Neugarten, et al. (1961) in conjunction



with the Life Satisfaction Rating (L.S.R.) for use in the Kansas City Study of Adult Life.

The L.S.I. - A is a self-report index, while the L.S.R. is based on ratings made by trained experts and validated against a panel of experts. These measures can be used alone or together. The correlation between the two instruments has been either .55 (n=177) or .56 (n=281) (Neugarten et. al, 1961; Wood et. al, 1969).

This study used only the L.S.I. - A self-report index, as modified by Adams (1969). The instrument has been widely used and tested (Bull & Aucoin, 1975; Wood et. al, 1969; Adams, 1969), and consists of 20 items which purport to measure five components associated with life satisfaction. These are: zest for life, resolution/fortitude, congruence, positive self-concept, happy mood tone. Sample items include:

Yes      No

Most of the things I do are boring or monotonous  
I have made plans for things I'll be doing a month  
or a year from now

Wood et. al elected to drop seven of the twenty items from the scale after correlating L.S.R. and L.S.I. - A items. Adams' later analysis, using 507 subjects, however, determines reliability of all the index items, number of factors measured by the index, and the number of components represented by the index. Two of the original twenty items performed poorly when subjected to item/whole correlations and were later dropped by Adams, since they accounted for only .07 and .008 of the variance respectively. Neugarten's weighted scoring was discarded by Adams in favor of assigning one point for each correct answer, since a

correlation of .97 was found between the weighted measurement and usual method of scoring. Adams feels that L.S.I. - A provides a fair measure of life satisfaction in the older adult for both urban and rural populations, after the two items are dropped, and his revised scale is used in the present study.

#### E. Developmental Tasks of Later Life Scale

This instrument was created by Kurtz and Wolk (1975) in an attempt to measure the degree to which retired people accomplish Havighurst's developmental tasks (or roles) of later life. Some of the task accomplishment which the index attempts to measure are: adjustment to retirement and reduced income, death of spouse and establishing affiliation with one's age group.

Seven types of tasks are measured, with two questions for each task. One question attempts to look at behaviour, the other at the perceptual dimensions of each task. For example:

Developmental task: Establishing affiliation with one's age group

Behavioural aspect: I avoid being with other people  
Perceptual aspect: Making new friends is hard for me

Developmental task: Adopting and adapting social roles in a flexible way

Behavioural aspect: I still do many worthwhile things  
Perceptual aspect: Younger people can do most things better than older people

Items are answered by placing a check in either the "yes" or "no" column. Maximum obtainable in the fourteen-item scale is fourteen points.

Instructions and sample questions appear below:

PLEASE ANSWER THE FOLLOWING QUESTIONS ACCORDING TO WHETHER FOR YOU THE ANSWER IS MAINLY "YES", OR MAINLY "NO"

	<u>YES</u>	<u>NO</u>
1. Reduced strength keeps me from doing the things I need to do	_____	_____
2. One can learn to live a good life even in reduced health	_____	_____

Kurtz & Wolk submitted the instrument to a panel of their colleagues who are purported to be experts in human development, and who agreed with the scoring key. They claim that content validity has been established.

Kurtz & Wolk correlated the scores of the Developmental Tasks questionnaire with the L.S.I. - A ( $r=.52$   $p < .01$ ). They indicate that the measure could be improved, but does measure aspects of continued growth and adjustment to the developmental tasks of later life. For purposes of the study, item/whole correlations were checked in order to establish reliability. Table 1 presents means, standard deviations and item/whole correlations for the fourteen items of the scale. All items were significantly correlated to the whole scale score and ranged from a low of .22 for "I avoid being with old people" to a high of .59 for "Retirement is as worthwhile as work" ( $p < .05$ ). The mean item/whole correlation score was  $r=.43$  ( $n=85$ ).

TABLE 1  
 MEANS, STANDARD DEVIATIONS AND ITEM/WHOLE CORRELATIONS  
 FOR DEVELOPMENTAL TASKS OF LATER LIFE SCALE

Item	Mean	S.D.	Item/Whole Correlation*
1. Reduced strength keeps me from doing the things I need to do	.69	.46	.32*
2. One can learn to live a good life even in reduced health	.92	.26	.43*
3. I manage to live a good life even with limited income	.93	.26	.38*
4. Retirement is as worthwhile as work	.75	.44	.59*
5. I find it (or would find it) difficult to live alone	.64	.48	.40*
6. A surviving husband or wife can learn to get along	.82	.39	.34*
7. I avoid being with old people	.89	.31	.22*
8. Making new friends is hard for me	.76	.43	.53*
9. I still do many worthwhile things	.88	.35	.54*
10. Younger people can do most things better than older people	.59	.49	.56*
11. My living arrangements suit me fine	.86	.35	.51*
12. I would be satisfied only living in my own household	.56	.50	.37*
13. Family and friends help when I have troubles	.87	.34	.45*
14. I could accept being dependent on my children or on others	.24	.43	.36*

\*  $r < .18$ ,  $df = 83$ ,  $p < .05$

\* includes contribution of item to whole-scale score

## F. Social Participation Scale

Most of the sixteen items for this scale were adapted from other scales measuring use of leisure time (e.g. Litchfield, 1965; Blau, 1973). They concern all areas of participation, both with friends and the community at large, as well as the less social pursuits which indicate an interest in the world, for example, reading books and newspapers.

Respondents were asked to rank their level of participation on a five-point scale for each question by circling the appropriate number, for example:

I visited with relatives in their home or apartment	1. Every day
	2. Once a week
	3. Once a month
	4. Once a year
	5. Not at all

A panel of five adult educators from the Adult Education Research Centre at University of British Columbia reviewed the scale and helped clarify questions and wording. The final three questions on the scale, which relate to voting behaviour, were combined to form one question, bringing the number of questions down to fourteen. The questions were pre-tested and an item/whole analysis conducted to establish unidimensionality (Table 2). The mean item/whole correlation was .64 (n=85).

Two item/whole correlations were in the reverse direction to the one hypothesized (in other words, they were negatively, rather than positively associated with the whole-scale score). Unfortunately, the item/whole analysis was conducted at a time when it was too late to drop the unsatisfactory items from the scale. In any subsequent use of the

scale it would be desirable to either drop the "offending" items or conduct another analysis examining the unidimensionality of the scale. Our analysis involving the Social Participation Scale was weakened because of the presence of these two items but the scale was deemed to be sufficiently internally consistent for the analysis attempted here.

The following chapter describes the respondents and data collection. Implications of using a population of older adults with physical disabilities are also discussed.

TABLE 2  
 MEANS, STANDARDS DEVIATIONS AND ITEM/WHOLE CORRELATIONS  
 FOR SOCIAL PARTICIPATION SCALE  
 (n=20 pretest subjects)

Item	Mean	Standard Deviation	Item/Whole Correlation
1. I attended movies, plays or concerts	3.10	1.02	- .20
2. I read a newspaper	1.45	.99	.39
3. I helped care for another person (other than spouse)	4.05	1.53	.30
4. I took an overnight (or longer) pleasure trip	2.75	1.44	.10
5. I participated in volunteer community work	4.30	1.12	.35
6. I attended meetings of an organization, association or club	2.30	1.12	.33
7. I read books for the purpose of learning about something	2.00	1.25	.17
8. I attended a hobby or craft group	3.70	1.30	.17
9. I visited with neighbors or friends	3.00	.91	.51
10. I attended adult education courses at night school	3.25	1.55	.49
11. I carried on a conversation with a stranger on a bus, at a park	2.80	1.40	.81
12. I visited with relatives in their home or apartment	2.75	.78	.39
13. I talked socially over the phone	2.10	.96	.36
14. I voted in the last Federal election	1.00	0.00	*
15. I voted in the last Provincial election	1.00	0.00	*
16. I voted in the last Municipal election	1.15	.36	- .20

Means for 20 pretest subjects 2.70      .98      .30

Means for 84 participants in the main study 3.50      1.05      .64

\* These two items had a standard deviation of zero and were thus not amenable to correlation.

## CHAPTER IV

### METHODOLOGY

#### A. Population

The population for this study was 118 older adults participating in courses designed especially for retired people and sponsored by various institutions. Participants in classes within a twenty-mile radius of downtown Vancouver were administered the questionnaire, since most activities for older adults in Vancouver could not be considered as adult education. Ineligible groups would include community centre-based classes on bridge, chess, carpet bowling, where a member of the club serves as co-ordinator of the activity, but where no instructional agent is present.

Course participants were chosen from a variety of socio-economic and educational backgrounds. Participants were known to reside in a variety of living accommodations, since some classes surveyed took place within retirement homes and associated drop-in centres, while others were held in community centres and educational institutions. The number of participants in any given course was very small; often not exceeding three or four. Certain types of courses, such as pottery and other crafts attracted larger numbers, for example ten to fifteen people per class. In order to collect an adequate number of completed questionnaires, it was necessary to visit ten centres which held courses for older people. A list of courses, sponsoring institution and number of participants appears in Table 3.



## B. Method of obtaining population for the survey

During the time period that the questionnaires were distributed and answered (January/February, 1976), new classes for older adults were beginning in many centres. Many of these classes could not be considered as falling within the definition of adult education; therefore it was estimated that fewer than 250 older adults would make up the total population of senior citizen adult education participants in the Greater Vancouver area. Rather than sampling some portion of this population, it was decided to visit each centre and have as many course participants as possible respond to the questionnaire, thus the returned questionnaires reflect the population, rather than just a sample. This alternative was chosen, because limited funding for programming means the courses are held erratically and briefly. They are sometimes poorly attended. It was therefore impossible to find a large enough population from which to obtain a random sample.

Some considerations were made for the type of course being taken by the individual. Courses were divided into four categories and respondents chosen so that each course category contained roughly the same number of participants.

Because the courses were open only to retired people and their spouses, no difficulty was experienced in narrowing the field of course participants to fit the definition of "retired person".

## C. Data Collection

Questionnaires were distributed by the researcher to classes

TABLE 3  
 RESPONDENTS CLASSIFIED BY INSTITUTION AND  
 COURSE TYPE

Name of Institution	Course name	Number in class	Number completing questionnaire
West Point Grey Recreation Project	Making Retirement work for you	15	10
New Horizons (Federal Dept. of Health & Welfare)	Creative Writing	9	8
Cedar Cottage Neighborhood House	Health for Seniors	20	8
Community Centred College for the Retired (News- Horizons Sponsored)	Anthropology	10	7
	Literature Appreciation	7	5
	Creative Writing	10	6
	Painting	7	5
Sunrise Pavilion Drop- In Centre	French	9	7
	Ceramics	9	3
Seton Villa Retirement Residence	Art	8	4
	Quilting Lecture	5	
	Lip Reading	5	5
	French	5	1
	Exercise	9	4
	Music Appreciation	7	4
	Glee Club	5	
Edmonds House Drop-in Centre and Senior Citizen high rise	Art	7	3
	Photography	7	3
	Canada and the World	10	7
	Today (Sponsored by Simon Fraser Univ.)		
	Exercise	7	5
St. Paul's Church Annex (drop-in centre)	Crafts	9	6
	Exercise class	9	4
Silver Harbour Manor (drop in centre)	French	7	6
	Pottery	8	4
	Crafts	8	3
Burquitlam Centre for Seniors	Creative Writing	3	-
		<hr/> 208	<hr/> 118

of potential respondents during January and February, 1976. Several weeks were required to collect data for the following reasons:

1. Weather conditions caused several classes to be cancelled for up to three weeks.
2. Many courses were not underway by the beginning of January. Collection of data was conducted on the third or fourth class, when enrolment had stabilized.
3. All courses had small numbers of participants; therefore it was necessary to survey ten groups in order to gather over 100 respondents.
4. Classes for older adults (other than purely recreational) are difficult to find within the city, and it was necessary to travel some distance to find appropriate adult education classes.

An attempt was made to have potential respondents fill out the questionnaire (four pages, both sides of the page) during class time. It became obvious after two classes had been approached that this method was difficult for older people. The following problems emerged:

1. Class time is often short (1/2 to 1 hour) because of the age and physical frailty of some participants. Therefore, instructors and participants resented giving up class time to fill out a questionnaire.
2. Older adults in the lower mainland of Vancouver who attend drop-in centres have been "surveyed to death" by city departments, parks and recreation branches, or federal health and welfare agencies. There were those who were

unwilling, in many cases, to sit down during the course of a class and fill out yet another form.

3. Because of the physical limitations of many older participants, the time required for a class to complete the forms was up to 45 minutes. Nearsightedness, arthritis and other physical incapacities made it difficult for some participants to complete the form at all.
4. Lack of formal education and difficulty with the English language were also barriers for potential respondents, who, in some cases, could not understand all the questions.

When all the above factors were considered, a new course of action was developed. Respondents were issued questionnaires by the researcher, who explained each aspect and asked that the form be returned for the next class. In this way, the form could be taken home and answered at the leisure of participants. The researcher was aware that the return rate would diminish.

As expected, the return rate of the questionnaires was fairly low. Two-hundred and fifty forms were distributed, and 144 were returned. Twenty-six were unusable, 118 were complete except for the Education Participation Scale, leaving 85 which were wholly completed. Given the number of limitations experienced by many participants, the fairly low rate of returns was not surprising. Had the questionnaire been completed in class, many of those who otherwise would choose not to complete a form may have succumbed to peer group and instructor pressure, and done so unwillingly. Such a negative feeling might easily bias responses.

### Implications

Casual observation led the researcher to believe that because of the previously mentioned barriers hindering the potential respondents, those who did complete the questionnaire may not be representative of the older population. For example, physical disabilities such as arthritis would not predominate in those adults who did respond. As well, reasons given for refusing to complete the questionnaire would indicate that those with a more positive self-image tended to be willing to help with such a project. Many older adults who refused to respond felt their views were unimportant, and that their efforts to fill out a form would not be appreciated by the researcher. Some potential respondents felt they had no knowledge which could contribute to a research project.

Subjectively, it would appear that those retired participants who consented to fill out the questionnaire were more physically capable, possess a more positive self-image, and reached a higher educational level than those who refused to respond.

### D. Data Analysis Plan

This study was concerned with determining the relationships between one motive for participation (Escape/Stimulation) and three measures of psycho-social characteristics of the older adult participant. It was thus necessary to obtain correlation matrices of the variables. Factor analysis of the Education Participation Scale scores produced a number of motivational orientations, scores of which were then correlated with the other variables.

Frequency counts of nominal socio-demographic data were first obtained. Variable means, and a correlation matrix were obtained for the total number of respondents (n=118). This number includes the 33 respondents who failed to complete the Education Participation Scale portion of the questionnaire. A correlation matrix was also obtained for those 85 respondents who completed the entire questionnaire.

Raw data from the Education Participation Scale were then factor-analyzed and factor scores produced from regression equations. All eleven factors with eigenvalues greater than 1.00 were orthogonally rotated to produce four factors for subsequent interpretation. Education Participation Scale factor scores were correlated with demographic data, life satisfaction, adjustment and social participation scores. Analysis was performed only on the data of the 85 respondents who completed the entire questionnaire (the 33 respondents who did not complete the E.P.S. were excluded).

## CHAPTER V

### RESULTS OF THE STUDY

Chapter V first details the socio-demographic characteristics of the population. A second section discusses factor solutions and the relationships between Education Participation Scale factors and the three instruments attempting to measure social participation, adjustment to the developmental tasks of later life, and life satisfaction in the later years.

The hypotheses for the study were as follows:

1. That Escape/Stimulation correlates with life satisfaction; older persons with high Escape/Stimulation motives will exhibit dissatisfaction on measures of life satisfaction.
2. That Escape/Stimulation correlates with adjustment to developmental tasks; older persons with high Escape/Stimulation motives will exhibit maladjustment on measures of adjustment to developmental tasks of later life.
3. That Escape/Stimulation correlates with social participation; older persons with high Escape/Stimulation motives will exhibit low levels of social participation.

#### A. Characteristics of Course Participants

The older adult participants of this study reside in urban areas varying from high to low-density populations. They were assumed to be in adequate or good health, since most were able to travel to and from a drop-in centre for the retired. Many participants spoke of eyesight and hearing problems; but these deficiencies were often being compensated for

in the classroom.

#### Sex

The present study did not employ random sampling techniques but reveals that of the 118 respondents, only twenty (17 percent) were male, while ninety-eight (83 percent) were female.

#### Marital Status

Widowed women (and men) accounted for the largest proportion of participants (45 percent), while 46 (39 percent) were married. Single, divorced and separated adults account for 19 participants, or 16 percent of the total number of respondents (n=118).

#### Age

The mean age of respondents completing the entire questionnaire was 69.7 years (n=85). When the 33 respondents who did not complete the Education Participation Scale were added, the mean age of respondents increased to 70.2 years (n=118). The youngest respondent of retirement age was 50, and the oldest was 86 years of age.

#### Birthplace

Sixty-one (52 percent) of the respondents were of Canadian birth while 46 (38 percent) were born in Great Britain. Of the remaining participants, six (5 percent) were born in the United States and five (4 percent) were born in other areas of the world (n=118).

#### Occupation and Retirement

The Blishen scale was adapted to determine socio-economic standing



by occupation (see Chapter III). An additional category was established (0) to code women who had never worked outside the home. Those women who had worked at any point in their lives for a number of years (equal or greater than the number of years spent entirely in the home) were considered to have had occupations, and were included in the Blishen categories (n=118).

Table 4 reveals that 60 of the 118 respondents fell into the top three occupational categories, excluding the "housewife" (0) category. Thirty-eight (31 percent) were included in the lower four categories. Although many of the respondents were older women who by tradition are homemakers, 67 of them (57 percent) indicated that their major employment through the years was outside the home, whereas 51 (43 percent) classified themselves as career housewives, who may have briefly worked before marriage and after children left home.

#### Educational Background

Although many older adults are today functionally illiterate due to lack of teaching facilities in the early part of the century, the educational qualifications of this population appear to be generally high. Only three respondents had no formal educational background, whereas 89 (76 percent) claim to have completed either secondary school, vocational training, or university degree(s) (Table 5).

#### Present Residence

Robinson (1972) concluded that older adults who participate in adult education courses tend to be autonomous and wish to remain in their

own homes as long as possible.

Fifty-two respondents (44 percent) owned their own houses, while 36 (31 percent) maintained self-contained apartment suites. Since two of the educational centres surveyed are attached to senior citizen's housing complexes, it is not surprising that 29 (35 percent) of the respondents resided in such dwellings. Most of the 29 lived in Seton Villa, a retirement home which provides meals for residents. None of the participants resided with relatives, while only one lived in a boarding home (n=118).

#### Courses

Respondents were fairly well distributed amongst the four course categories: motor skills, verbal skills, liberal arts, and adjusting to retirement (Table 6). This distribution was intentional, so that participants in all types of educational courses might be studied. In fact, a large percentage of courses provided for older adults would fall into the motor skills area, with fewer centres providing for other types of needs.

TABLE 4  
DISTRIBUTION OF RESPONDENTS ACCORDING TO FORMER  
OCCUPATION

Blishen Code	Former Occupation	Number of Respondents	Percent of Respondents
0	Career Housewife	21	18
1	Professional (doctor, lawyer, professor)	20	17
2	Executive, manager	14	12
3	Other white collar professions	26	22
4	Mechanics, machine operators	7	6
5	Office clerk, machine operators	13	11
6	Sales clerk, elect. workers	11	9
7	Housekeepers, deckhands	6	5
	TOTAL	118	100%

TABLE 5  
DISTRIBUTION OF RESPONDENTS ACCORDING TO EDUCATIONAL  
BACKGROUND

Educational Level	Number of Respondents	Percent of Respondents
No qualifications	3	2.5
Elementary School	26	22.0
Secondary School	34	29.0
Vocational Training	39	33.0
University degree(s)	16	13.5
TOTAL	<u>118</u>	<u>100%</u>

TABLE 6  
DISTRIBUTION OF RESPONDENTS ACCORDING TO COURSE TYPE

Course Type	Number	Percent
Motor skills	47	40
Art - painting crocheting, quilting pottery, ceramics		
Verbal Skills	33	28
French Lip-reading Creative writing		
Liberal Arts	21	18
Anthropology Economics		
Adjusting to Aging		
St. John's Ambulance Health for Seniors	17	14
Making Retirement work for you		
TOTAL:	118	100%

## B. Education Participation Scale - Factor Structure and Labelling

### Description of Factor Analysis

Data from the Education Participation Scale (n=85) were subjected to factor analysis (principal components analysis and orthogonal rotation).

Factor analysis reduces a large number of observations to a smaller number of fundamental variables. By using this process, the smaller number of variables can then be conveniently correlated with other variables. The minimum number of factors adequately accounting for the correlation matrix is established, and these factors are named according to the characteristics they apparently represent (Zimbardo & Ruch, 1975).

In the present study, for example, one of the factors extracted was labelled "Cognitive Interest", since all of the five items refer to the respondents' professed interest in learning. Factor scoring is important, as it reveals the extent to which participants are enrolled for reasons described in the items. Without such scoring, it is not possible to state that people enrol for any of the reasons identified.

### Factor Rotation

The initial factoring and rotation produced eleven factors with eigenvalues greater than 1.00. Of these factors, seven contained three items or fewer (factors II, IV, VII, VIII, IX and XI). These eleven factors account for 75 percent of the variance. Since minor factors are not necessary to the purposes of the present study, the data was orthogonally rotated to produce three, four and five-factor solutions.

Cattell's (1966) Scree test indicated that, of the three possible solutions, a four factor solution and rotation best served the purposes of this study. Previous studies using the Education Participation Scale (Morstain & Smart, 1974; Haag, 1976; Boshier, 1976a) have found a five or six factor solution to be most appropriate. Since, for the purposes of this study, all items pertaining to employment were deleted from the Education Participation Scale, the loss of one factor (Professional Advancement) was expected. Items which loaded .40 or more after rotation were included in the respective factors (Table 7).

The factor structure reproduced in Table 7 resulted in four orientations. These four factors accounted for 50 percent of the variance. Subsequently, four factor scores were produced for each respondent, revealing the extent to which each participated for a given reason, or motive. Factor scores were normalized so that the mean equals zero, standard deviation equals + one - one.

TABLE 7  
 ITEMS AND FACTOR LOADINGS OF THE EDUCATION PARTICIPATION  
 SCALE AFTER ORTHOGONAL ROTATION\*

Items	I Escape Stimulation	II Social Welfare	III Social Contact	IV Cognitive Interest
4. To get relief from boredom	* .70	* .10	.11	-.25
7. To overcome the frustration of day to day living	* .69	.03	-.04	-.15
24. To get a break in the routine of home or work	* .68	.18	-.27	.22
13. To keep up with competition	* .61	-.27	-.15	-.01
20. To have a few hours away from responsibilities	* .60	.04	-.11	.23
26. To keep up with others	* .55	-.39	-.23	.07
5. To carry out the recommendation of some authority	* .54	-.35	-.13	.16
10. To stop myself from becoming a "vegetable"	* .54	.00	-.18	-.28
15. To gain insight into my personal problems	* .53	-.22	.05	.15
8. To be accepted by others	* .52	-.33	-.31	.06
35. To comply with instructions from someone else	* .50	-.27	-.21	.16
31. To comply with the suggestions of someone else	* .48	-.10	.01	.16
17. To escape television	* .47	-.14	-.15	-.07
29. To escape an unhappy relationship	* .47	-.23	.05	-.12
9. To supplement a narrow previous education	* .45	-.32	-.15	-.26
30. To provide a contrast to my previous education	* .45	-.24	-.13	.01
28. To maintain or improve my social position	* .44	-.30	-.29	.13
23. To provide a contrast to the rest of my life	* .41	-.06	-.25	.11
<hr/>				
2. To share a common interest with my spouse or friend	.10	*-.49	-.11	-.21
19. To gain insight into human relations	.27	*-.55	.10	-.31
11. To acquire knowledge to help with other educational courses	.25	*-.73	.09	.10
3. To become more effective as a citizen	.17	*-.73	-.09	-.12
34. To improve my ability to participate in community work	.09	*-.75	-.21	.10
18. To prepare for community service	.14	*-.80	-.02	.13
25. To improve my ability to serve mankind	.01	*-.83	-.19	.00
<hr/>				
27. To improve my social relationships	.20	-.33	*-.63	.20
12. To fulfil a need for personal associations and friendships	.22	-.07	*-.69	.00
33. To make new friends	.23	-.15	*-.76	.01
14. To participate in group activity	.13	.03	*-.81	.00
22. To become acquainted with congenial people	.14	-.08	*-.82	-.21
<hr/>				
16. To help me earn a degree, diploma or certificate	.26	-.07	.16	.39
32. To learn just for the sake of learning	.11	.14	-.07	*-.59
1. To seek knowledge for its own sake	.05	-.11	.19	*-.67
21. To learn just for the joy of learning	.10	-.08	-.15	*-.69
6. To satisfy an enquiring mind	-.08	-.10	.22	*-.72
<hr/>				
Sum of squared factor-loadings divided by sum of communalities	.34	.27	.21	.16
Variance accounted for	24.79	9.27	8.14	6.77
Cumulative variance accounted for	24.79	34.07	42.22	48.99



Appendix "A" contains a listing of the Education Participation Scale items which constituted the Escape/Stimulation factor in Boshier's (1976a), Haag's (1976) and Morstain & Smart's (1974) studies. It must be reiterated that in the present study the author employed a coarser solution than had been used in the five-factor Boshier, six-factor Haag and six-factor Morstain & Smart studies. Thus, the present Escape/Stimulation factor contains some items which have loaded on the External Expectations factor in studies employing finer factor solutions. However, of importance to this study is the fact that all items that have constituted the Escape/Stimulation factor in the previously mentioned studies are present in the Escape/Stimulation factor of this study. Although not exactly identical, the present Escape/Stimulation factor does strongly resemble Haag's comparable factor. Thus Haag's correlations between Escape/Stimulation factor scores and measures of neuroticism and self-actualization are relevant to the present study.

#### Labelling Factors

Factor labels, Escape/Stimulation, Social Welfare, Social Contact and Cognitive Interest are similar to those used by Morstain & Smart, Boshier and Haag. Names for the four factors used in this study were applied only after each item in the factor was carefully scrutinized, and it was decided that all items were related to the factor label under consideration.

All eighteen items in the Escape/Stimulation factor concerned individuals motivated to attend a course in order to escape from or avoid another task. For example, items falling into this factor

include: "To escape television", "To escape an unhappy relationship", "To have a few hours away from responsibilities."

Items in the Social Welfare factor concern the desire to participate in adult education for community involvement and help, for example; "To become more effective as a citizen", or "To gain insight into human relations". The five items in the Social Contact factor are related to group or personal involvement; "To make new friends", "To participate in group activity". The Cognitive Interest factor consists of five items related to an expressed desire to "Seek knowledge for its own sake", or "Learn for the sake of learning".

#### Factor Structure after Rotation

All 35 E.P.S. items used were contained within the four factors. Items in all of the factors were pure, since none loaded significantly on any other factor. This was a satisfying analysis because in most previous factorings of motivation instruments there are usually "passenger" items with low loadings on all factors or "impure" items which load on more than one factor. There were no passenger or impure items in this analysis.

#### Factor Content

Factor I: All the items in Factor I, Escape/Stimulation concern overcoming deficiency, for example; to escape an unhappy relationship, or find relief from boredom. This factor contains 18 of the instrument's 35 items and accounts for 24.9 per cent of the variance.

TABLE 8  
ITEMS AND LOADINGS FOR ESCAPE/STIMULATION FACTOR (FACTOR I)

Item Number		Factor Loading
4	To get relief from boredom	.70
7	To overcome the frustration of day to day living	.69
24	To get a break in the routine of home or work	.68
13	To keep up with competition	.61
20	To have a few hours away from responsibilities	.60
26	To keep up with others	.55
5	To carry out the recommendation of some authority	.54
10	To stop myself from becoming a "vegetable"	.54
15	To gain insight into my personal problems	.53
8	To be accepted by others	.52
35	To comply with instructions from someone else	.50
31	To comply with the suggestions of someone else	.48
17	To escape television	.48
29	To escape an unhappy relationship	.47
9	To supplement a narrow previous education	.45
30	To provide a contrast to my previous education	.45
28	To maintain or improve my social position	.44
23	To provide a contrast to the rest of my life	.41

Factor II: Social Welfare contains seven items, all of which pertain to the respondent's stated desire to be involved in the community. This factor contains 7 items and accounts for 9.27 per cent of the variance.

TABLE 9

## ITEMS AND LOADINGS FOR SOCIAL WELFARE FACTOR (FACTOR II)

Item Number		Factor Loading
22	To share a common interest with my spouse or friend	-.49
19	To gain insight into human relations	-.55
11	To acquire knowledge to help with other educational courses	-.73
3	To become more effective as a citizen	-.73
34	To improve my ability to participate in community work	-.75
18	To prepare for community service	-.80
25	To improve my ability to serve mankind	-.83

Factor III: Five items constitute Social Contact. All relate to respondents' expressed desire to improved quality or quantity of social relationships, for example, to make new friends, or participate in group activity. This factor accounts for 8.14 percent of the variance.

TABLE 10  
ITEMS AND LOADINGS FOR SOCIAL CONTACT FACTOR (FACTOR III)

Item Number		Factor Loading
27	To improve my social relationships	-.63
12	To fulfil a need for personal associations and friendships	-.69
33	To make new friends	-.76
14	To participate in group activity	-.81
22	To become acquainted with congenial people	-.82

Factor IV: The fourth factor, Cognitive Interest, contains five items, each relating to a desire to learn for the sake of learning. This factor accounts for 6.77 per cent of the total variance.

TABLE 11  
ITEMS AND LOADINGS FOR COGNITIVE INTEREST FACTOR  
(FACTOR IV)

Item Number		Factor Loading
16	To help me earn a degree, diploma or certificate	(.39)
32	To learn just for the sake of learning	-.59
1	To seek knowledge for its own sake	-.67
21	To learn just for the joy of learning	-.69
6	To satisfy an enquiring mind	-.72

Relationship of factors to the growth/  
deficiency model

Boshier (1971) suggested that E.P.S. factors could ultimately be associated with measures of deficiency and growth motivation, as depicted by Maslow (1962). Boshier's (1976a) study of night school participants attempted to isolate factors revealing either growth or deficiency motives or reasons for participation. For example, he claimed that the Escape/Stimulation factor is indicative of deficiency motivation, while Social Welfare and Cognitive Interest factors may indicate growth motivation.

Haag isolated three E.P.S. factors which were significantly correlated with measures of deficiency or growth motivation. One is relevant to the present study. The Escape/Stimulation factor, he claimed, is a "reasonably valid indicator of deficiency motivation". (1976a, p. 54).

High scores on this factor correlated positively with high degrees of neuroticism and low scores on the measure of self-actualization.

The growth/deficiency model was developed to show that motives for participation are not independent, but related to age, psychological states and other characteristics of an individual.

C. Correlation of Factor Scores with Life Satisfaction Index, Adjustment to Developmental Tasks of the Later Years, and Social Participation Scale - Testing the Hypotheses

In the following section, reading of the sign appearing in front of each Education Participation Scale factor requires care. The direction of the correlation coefficient is a function of the polarity of the factor. For example: Factor I, Escape/Stimulation is scored in the direction of high need for Escape and Stimulation. Logically then, Life Satisfaction correlates negatively with Escape/Stimulation since "escaping" is the reverse of satisfaction.

Education Participation Scale factor scores were correlated with Life Satisfaction Index - A, Adjustment to Later Life Scale, and Social Participation Scale scores (Table 12). The hypothesized relationships were as follows: that older people participating in adult education for Escape/Stimulation reasons will also experience a low degree of life satisfaction, low adjustment to developmental tasks of later life, and low degree of social participation.

TABLE 12

CORRELATION BETWEEN E.P.S. FACTOR SCORES AND THREE SCALES  
INDICATING SOME CHARACTERISTICS OF THE OLDER ADULT

Variable	Factor I Escape/ Stimulation (+) ***	Factor II Social Welfare (-)	Factor III Social Contact (-)	Factor IV Cognitive Interest (-)
Social Participation Scale (low score indicates high level of par- ticipation)	.18*	.29**	.04	.23*
Adjustment to Develop- mental tasks of later life Scale (high score indicates high level of adjustment)	-.31**	-.19*	.06	.02
Life Satisfaction Index (high score indicates high level of satisfaction)	-.26*	-.10	-.07	.03

\* $r > .183$ ,  $df=83$ ,  $p < .05$  (one tailed test)

\*\* $r > .256$ ,  $df=83$ ,  $p < .01$  (one tailed test)

\*\*\*positive and negative signs indicate direction of factor loading

#### Social Participation Scale

Boshier (1976a) indicates that those enrolling in courses for Escape/Stimulation are also involved in a higher number of meetings and other social activities than low Escape/Stimulation scorers. The present study, dealing strictly with retired adult education participants, hypothesizes that those motivated by Escape/Stimulation will be low



social participators. There was a positive correlation ( $r=.18$ ,  $p < .05$ ) between Social Participation scores and Escape/Stimulation factor scores. Respondents motivated by Escape/Stimulation do indeed participate less in social and community activities than respondents not motivated by Escape/Stimulation.

Similarly, there was a significant positive correlation between Social Participation and Social Welfare factor scores ( $r=.29$ ). Scores on the Cognitive Interest factor of the E.P.S. were positively correlated with Social Participation scores ( $r=.23$ ,  $p < .05$ ), indicating that a high level of social participation is enjoyed by respondents motivated by Cognitive Interest. The correlation between Social Contact factor and Social Participation scale score was insignificant ( $r=.04$ ).

#### Adjustment to the Developmental Tasks of Later Life

As hypothesized, developmental task scores correlated negatively with Escape/Stimulation factor scores ( $r=-.31$ ,  $p \leq .01$ ). Those respondents who are apparently coping well with developmental task accomplishment are not motivated to participate because of a desire for Escape/Stimulation. A positive relationship was shown between a high level of adjustment to developmental tasks and attendance in adult courses for Social Welfare reasons. Social Contact and Cognitive Interest factors were not related significantly to the adjustment to developmental tasks scores.

## Life Satisfaction Index - A

Only one of the four Education Participation Scale factors correlated significantly with this measure of life satisfaction. Those respondents enrolled for Escape/Stimulation reasons did not achieve high scores on the Life Satisfaction Index. There was a negative correlation ( $r = -.26$ ) between the two variables.

It was hypothesized that those older adults enrolled for Escape/Stimulation would also experience a low degree of life satisfaction, adjustment to developmental tasks of later life, and social participation. This has been shown to be the case. All three characteristics are significantly related to the Escape/Stimulation factor of Boshier's Education Participation Scale.

### D. Socio-demographic data

#### Age

Age correlated significantly with Social Welfare factor scores, but was not significantly related to the other three factors of the E.P.S. The older the respondents, the less likely they were to indicate Social Welfare as a motivation to participate in adult education activities ( $r = .25, p < .01$ ).

#### Occupation

Since all respondents were retired this variable refers to the most recent job held before retirement. For the purposes of this analysis "Career Housewives" who had never worked for wages, salary, commission etc., were deleted. With the deletion of these people, and other respondents who had not satisfactorily completed the E.P.S. and/or the demographic questionnaire, the  $n$  for this analysis was reduced to 74.

The correlation between Escape/Stimulation and Occupation just failed to attain significance at the .05 level ( $r = .18, df = 72, .05 < p < .10$ ) but strongly suggests that persons formerly of low occupational status were more inclined to be motivated by Escape/Stimulation (a deficiency factor) than were

persons who formerly occupied high status occupations.

E.P.S. Social Contact factor scores were significantly related to occupation. Persons formerly of low occupational status (on Blishen's scale) were significantly more inclined to be enrolled for Social Contact than persons of high status ( $r = .27$ ,  $df = 72$ ,  $p < .01$  - one-tailed test). This result is congruent with Boshier's (1971) factoring which located "Social Contact" among the other deficiency factors. In view of the fact Haag's (1976) results showed no significant correlation between Social Contact and Neuroticism or Self Actualization ( $r = .01$  and  $-.01$  respectively) the psychological foundations of this factor are still unclear. However, the need for social contact is a central problem encountered by older adults so this correlation adds to the validity of the relationships hypothesized by Boshier (1976a).

#### Major Employment

There was a negative relationship between Escape/Stimulation factor scores and "outside employment". In other words, people with a history of being in the work force for many years were not motivated to attend adult education courses for Escape/Stimulation ( $r = -.29$ ,  $p < .01$ ). The "major employment" variable showed no significance when correlated with the other three factor scores.

#### Educational Background

Educational level and Escape/Stimulation scores were negatively correlated ( $r = .37$ ,  $p < .01$ ). Thus participants with high Escape/Stimulation scores had significantly lower educational level scores than participants with low Escape/Stimulation scores. High Escape/Stimulation scores were therefore associated with low levels of education. High scores in Social Contact and Cognitive Interest factors, which may be indicative of growth motivation, were positively associated with a high educational level.

TABLE 13  
CORRELATION BETWEEN E.P.S. FACTOR SCORES AND RELEVANT  
SOCIO-DEMOGRAPHIC DATA

Variable	Factor I Escape/ Stimulation (+) ***	Factor II Social Welfare (-)	Factor III Social Contact (-)	Factor IV Cognitive Interest (-)
Age	.08	.25**	.06	.11
Occupation	.18	-.17	-.27#	-.27#
Major employment	-.29**	-.13	.00	-.05
Educational Background	-.37**	.06	.19*	.18*

\* $r > .183$ ,  $df=83$ ,  $p < .05$  (One tailed test)

\*\* $r > .256$ ,  $df=83$ ,  $p < .01$  (One tailed test)

\*\*\*positive and negative signs indicate direction of factor loading  
# $r > .19$ ,  $df=72$ ,  $p < .05$  (One tailed test)

#### E. Discussion of results

The hypotheses for the study were:

1. That Escape/Stimulation correlates with life satisfaction; older persons with high Escape/Stimulation motives will exhibit dissatisfaction on measures of life satisfaction.
2. That Escape/Stimulation correlates with adjustment to developmental tasks; older persons with high Escape/Stimulation motives will exhibit maladjustment on measures of adjustment to developmental tasks of later life.
3. That Escape/Stimulation correlates with social participation; older

persons with high Escape/Stimulation motives will exhibit low levels of "social participation".

#### Testing the hypotheses

Those older adults who are low social participators tended to be Escape/Stimulation motivated, which Boshier (1976a) and Haag (1976) have shown to be related to deficiency motivation. These respondents appeared to be in the process of disengaging from society and participate to escape from a domestic problem or condition. Those respondents who scored low on the measures of adjustment to developmental tasks, and life satisfaction were also participating for Escape/Stimulation reasons, indicating deficiency motivation.

High scorers on the three measures of psycho-social characteristics tended to participate for Cognitive Interest and Social welfare reasons.

#### Socio-demographic data

Socio-demographic data revealed that few older men were participating in the classes surveyed. This may be partly due to the fact women live longer than men. As well, few adult education courses for the retired person appeal to what has traditionally been acceptable activity for men. For example, men tend not to participate in the many arts and crafts, glee club and dancing courses offered by community centres and residences for the retired. These courses outnumber other available types of education for the older adult. Most respondents were widowed and maintained their own residence and were reasonably well-educated.

Respondents tended to be "young" (under 70) and physically and financially independent.

Demographic variables and factor scores.

Demographic variables which correlated with Escape/Stimulation factor scores were "major employment", "educational background" and "occupation"\*. Those who had spent many years in the home, had a limited formal educational background or had worked in a low status occupation were inclined to be more Escape/Stimulation motivated than those who had been in the work force, worked in a high status occupation or whose educational level was substantial.

These results indicate that older adults are motivated to participate for a variety of reasons not necessarily related to course content, but to various psycho-social characteristics and life styles. The following chapter will summarize the results of this study and attempt to draw conclusions and look at implications of the research for the program planner and the researcher.

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\*  $r = .18$ ,  $df = 72$ ,  $.05 < p < .10$

CHAPTER VI  
IMPLICATIONS AND CONCLUSIONS

A. What this study has accomplished

In order to identify some of the less obvious needs of a clientele, the program planner must go beyond asking what subject matter is of interest to the potential participant. This study argues for a more comprehensive analysis of motives for participation, which arise out of needs. This is especially critical in the case of the older adult participant, who has large amounts of leisure time to fill, and who faces a number of unique problems associated with aging.

Results of the present study reveal a clear relationship between participation in adult education for reasons of Escape/Stimulation and low levels of adjustment to the developmental tasks of later life, life satisfaction in the later years, and social participation in retirement. Those older adults enrolled for Cognitive Interest reasons, on the other hand, exhibited a higher level of adjustment, satisfaction and social participation. Several points have been raised and will be discussed. They might be considered by the program planner or researcher who is concerned with education for the older adult.

New Knowledge

This study has further illustrated the stability of the Education Participation Scale factor structure. Four clear factors emerged, containing no "passenger" or "impure" items. Results of the

study contribute further to the generalizeability of the Education Participation Scale.

Correlations between the Escape/Stimulation factor and life satisfaction, adjustment to developmental tasks and social participation further reveal that motives are linked to psycho-social characteristics.

Haag (1976) showed that Education Participation Scale factors are related to neuroticism and self-actualization. Boshier (1976a) found that motivational orientations are related to social and psychological characteristics of age, socio-economic status, social participation and amount of previous participation in adult education.

In the case of the older adult, psycho-social characteristics which may have been present during the life cycle may become more marked after retirement. Stressful situations may occur during retirement which could create new needs, and hence, motives for participation. For example, the emptiness of increased leisure hours, loss of spouse, home or some physical capacities may all play a part in motivating the older adult to participate.

#### Application of Knowledge

Planners of programs for retired persons seldom have either the staff or resources to conduct a full-scale needs assessment with their clientele. They are usually younger adults, who have no direct experience of being retired from the work force and who cannot be fully cognizant of the problems faced by adults who no longer work. It appears that motives for participation are manifestations of psychological states and relate to all aspects of a person's life, both past and present. Thus if motives



are measured they can provide information and direction to the programmer who wishes to design compatible learning environments for older adults.

Courses which appear to attack problems of aging are offered at many institutions. However, no research has been conducted which indicates participant's relative success or failure to cope after taking part in a course such as "The Psychology of Aging", or "Creative Use of Leisure Time". Most people, too, are funnelled into arts and crafts because they are not aware of the opportunities which could be made available to them. Such courses can be meaningful only if the real motives for attendance are made clear to those running the programs. If, for example, an older adult reveals a high score on the Escape/Stimulation factor of the Education Participation Scale, the course should be designed to meet the deficiency needs revealed. Well-articulated courses which focus on coping mechanisms, interpersonal and problem-solving skills should be incorporated, since traditional classroom processes fail to open channels of communication. Participants could be encouraged to design their own programs, and to give maximum input during class time. They would therefore be escaping to a challenging, fluid and enjoyable situation over which they had at least partial control.

#### Future Research

Since adult educators do not know whether courses for older adults actually contribute to increased life satisfaction, no justification can be made for continuing such programs. Experiments could be designed which examine content, and design and management of instruction

in educational programs to determine which environments are compatible with the needs of the retired person.

A longitudinal study determining whether motives for participation change with aging would be of help to adult educators.

The relationship of deficiency and growth motivation to the factors in Boshier's Education Participation Scale has been partially validated by this study, but requires application to other groups of adult education participants.

#### B. Limitations of the Study

1. This study does not include all possible types of older adult participants. Respondents were chosen from age-segregated classes which were held strictly for the retired person. It is probable that retired participants of generally-available courses would reveal a different set of characteristics than those respondents in the present study. It was not feasible, however, to search out an adequate number of these participants to include in the survey.

2. Whereas the three instruments measuring psycho-social characteristics were designed for collecting data on the retired person, Boshier's Education Participation Scale was developed for use upon a more general population--any adult participant in educational activities. As such, the scale does not include items which may be peculiar to the special needs and motives of the older adult. For example, their motives for participation may grow out of the fact they are excluded from some other activities because of their advanced age (socially ostracized), or because

of a failure to cope with the financial, psychological, or health problems unique to retirement and old age. Thus if a retired person was motivated to attend an educational activity by a need to cope with one of the above problems, no item would exist on Boshier's Education Participation Scale which could logically explain this reason for participation.

The item which gives as a reason for participation "to overcome the frustration of day to day living" is too general. "To gain insight into personal problems" may approximate the respondent's reason for participation, but this is the only item which comes close to voicing the need for development of "coping mechanisms". In order that the instrument correspond to the older adult's reasons for participation, new items such as the following would be required:

"To help me adjust to the process of aging"

"Because some activity is expected of the older adult"

"To meet other retired people"

"To help me cope with the problems of retirement"

## C. Summary and Concluding Remarks

### 1. Summary

This study follows others, such as Boshier (1976a) and Sheffield (1964) in arguing that an analysis of motives and other psycho-social characteristics of the adult can provide general indicators of the scope of participants' needs, from which meaningful programs can be designed.

The adult respondents (118 older adult education participants) were motivated to satisfy their interests and needs by participating in adult education. The literature review examined social, psychological

and physiological forces present in the older adult which may ultimately cause him to participate, and looked at ways of analyzing both needs and participation patterns of adult.

For this study, one reason, or motive for participation (Escape/Stimulation) was isolated from Boshier's Education Participation Scale and correlated with three indicators of psycho-social characteristics of the older adult, measured by the Life Satisfaction Index - A, Developmental Tasks of Later Life Scale, and a measure of Social Participation in older adults.

Correlation matrices of the variables were derived. The Education Participation Scale was factor analyzed and orthogonally rotated to produce four factors, labelled Escape/Stimulation, Cognitive Interest, Social Contact and Social Welfare. All E.P.S. items used were contained in the four factors, with no passenger or impure items. Factor scores were correlated with three measures of psycho-social characteristics; the three hypotheses were confirmed. The older adult respondents of this study who enrolled for reasons of Escape/Stimulation also displayed a low level of life satisfaction in the later years, adjustment to the developmental tasks of later life, and social participation.

## 2. Concluding remarks

When older adults are "put out to pasture" at the age of 60 or 65, they are faced with many challenges. Rapid change has become the rule in modern society, requiring adults at all stages of the life cycle to adapt to stressful situations. This may include complicated financial situations, the changing role of women, or the fact that increased leisure time is

becoming available to most people. For these and other reasons, the sense of well-being and future in the retired person may wane. Intervention strategies developed by adult educators can teach skills and coping mechanisms for future changes and pressures on the individual (Birren & Woodruff, 1973). A great deal of re-education and creation of new roles for older persons must be undertaken by adult educators, for:

Unless there are opportunities for older persons to continue to learn and re-learn the facts and forces that will be operating in society in the twenty-first century, a sub-culture of the aged, psychologically isolated from younger age groups, will develop . . ." (Vickery, 1972, p. 19)

Social gerontologists have begun to lay some of the groundwork which adult educators must continue in order to help deal constructively with the vast numbers of well-educated, active retired people who make up a large segment of society, but whose problems in adjusting to old age are many. It is clear that participation, rather than disengagement should be a criteria of successful aging. Both deficiency and growth-motivated people presently participate and the possibility of satisfying many of their needs is the challenge of the adult educator. Programs are needed which help the older adult understand and enjoy old age, cope with change and develop a realistic attitude towards life which may result in the emergence of a growth motivated, or self-actualized person.

Studies such as the present one focus on psycho-social motives or reasons for participation of the older adult. This information could lead to an awareness on the part of the adult educator that a wide variety of learning environments must be available to the older adult. They must be congruent with his interest in course content, but more importantly,

with the needs and motives which impel him to participate.

## APPENDIX A

ITEMS AND LOADINGS IN THE ESCAPE/STIMULATION FACTOR OF THE  
EDUCATION PARTICIPATION SCALE IN THREE MOTIVATIONAL ORIENTATION STUDIES\*

Education Participation Scale Item	Riddell 1976	Boshier 1976	Haag 1976	Morstain & Smart 1974 +
4 To get relief from boredom	.70*	.60*	.70*	.72*
7 To overcome the frustration of day to day living	.69*	.74*	.68*	.58*
24 To get a break in the routine of home or work	.69*	.80*	.75*	.68*
13 To keep up with competition	.61*	.11	.04	#
20 To have a few hours away from responsibilities	.60*	.68*	.52*	.58*
26 To keep up with others	.55*	.21	.03	#
5 To carry out the recommendation of some authority	.55*	.06	.11	#
10 To stop myself from becoming a "vegetable"	.54*	.58*	.61*	.53*
15 To gain insight into my personal problems	.54*	.32	.14	#
8 To be accepted by others	.52*	.33	.05	#
35 To comply with instructions from someone else	.50*	.01	.11	#
31 To comply with the suggestions of someone else	.48*	.01	.01	#
17 To escape television	.48*	.49*	.56*	.41*
29 To escape an unhappy relationship	.47*	.42*	.41*	.44*
9 To supplement a narrow previous education	.46*	.09	.14	#
30 To provide a contrast to my previous education	.45*	.36	.07	#
28 To maintain or improve my social position	.45*	.15	.02	#
23 To provide a contrast to the rest of my life	.42*	.55*	.65*	.60*

\*Factor loadings greater than .40 after orthogonal rotation

+ "To escape the intellectual narrowness of my occupation" loaded on the Escape/Stimulation factor but was deleted from the present study because it was deemed to be job-related and thus irrelevant to retired people.

# These items may have loaded between .30 and .39. However, Morstain & Smart (1974) did not include this information in their report.

APPENDIX B<sup>1</sup>

PLEASE DO NOT WRITE YOUR NAME ON THIS DOCUMENT

1. WHAT IS YOUR SEX?

2. WHAT IS YOUR MARITAL STATUS?

3. WHAT WAS YOUR DATE OF BIRTH?

4. WHAT IS THE NAME OF THE TOWN OR CITY IN WHICH YOU WERE BORN?

5. WHAT WAS YOUR OCCUPATION BEFORE RETIREMENT? (please be very specific about your former work - e.g. teacher in 7-teacher school, manager of a small trucking firm)

If you were a housewife for most of your adult life, please write in the word "housewife", and in brackets, give the specific title of the work you did before becoming a housewife.

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6. HOW LONG HAVE YOU BEEN FULLY RETIRED? \_\_\_\_\_ YEARS \_\_\_\_\_ MONTHS

7. WHAT IS YOUR HIGHEST EDUCATIONAL QUALIFICATION? (check only one box)

- no formal qualification
- completed elementary school
- grade 12 graduation or overseas equivalent
- post-secondary or trade qualification (e.g. vocational training, business diploma, etc.)
- university degree(s)

8. ARE YOU CURRENTLY LIVING IN:

- your own home
- the home of a relative
- an apartment
- a retired people's residence
- a boarding home
- other (please specify) \_\_\_\_\_



CONFIDENTIALEducation Participation Scale

Please indicate below the extent to which each of the reasons listed below influenced you to participate in this course or program. Circle one category for each question.

Sometimes the "much influence" category is on the right-hand side of the page, sometimes it is on the left. No reason for enrolling is any more or less desirable than any other reason. Please be frank. There are no right or wrong answers.

1.	To seek knowledge for its own sake	Much influence	Moderate influence	Little influence	No influence
2.	To share a common interest with my spouse or friend	No influence	Little influence	Moderate influence	Much influence
3.	To become more effective as a citizen	Much influence	Moderate influence	Little influence	No influence
4.	To get relief from boredom	No influence	Little influence	Moderate influence	Much influence
5.	To carry out the recommendation of some authority	Much influence	Moderate influence	Little influence	No influence
6.	To satisfy an enquiring mind	No influence	Little influence	Moderate influence	Much influence
7.	To overcome the frustration of day to day living	Much influence	Moderate influence	Little influence	No influence
8.	To be accepted by others	No influence	Little influence	Moderate influence	Much influence
9.	To supplement a narrow previous education	Much influence	Moderate influence	Little influence	No influence
10.	To stop myself from becoming a "vegetable"	No influence	Little influence	Moderate influence	Much influence

TO WHAT EXTENT DID THESE REASONS INFLUENCE YOU TO ENROL IN YOUR ADULT EDUCATION CLASS?

11.	To acquire knowledge to help with other educational courses	Much influence	Moderate influence	Little influence	No influence
12.	To fulfil a need for personal associations and friendships	No influence	Little influence	Moderate influence	Much influence
13.	To keep up with competition	Much influence	Moderate influence	Little influence	No influence
14.	To participate in group activity	No influence	Little influence	Moderate influence	Much influence
15.	To gain insight into my personal problems	Much influence	Moderate influence	Little influence	No influence
16.	To help me earn a degree, diploma or certificate	No influence	Little influence	Moderate influence	Much influence
17.	To escape television	Much influence	Moderate influence	Little influence	No influence
18.	To prepare for community service	No influence	Little influence	Moderate influence	Much influence
19.	To gain insight into human relations	Much influence	Moderate influence	Little influence	No influence
20.	To have a few hours away from responsibilities	No influence	Little influence	Moderate influence	Much influence
21.	To learn just for the joy of learning	Much influence	Moderate influence	Little influence	No influence
22.	To become acquainted with congenial people	No influence	Little influence	Moderate influence	Much influence
23.	To provide a contrast to the rest of my life	Much influence	Moderate influence	Little influence	No influence
24.	To get a break in the routine of home or work	No influence	Little influence	Moderate influence	Much influence

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TO WHAT EXTENT DID THESE REASONS INFLUENCE YOU TO ENROL IN YOUR ADULT EDUCATION CLASS?

25.	To improve my ability to serve mankind	Much influence	Moderate influence	Little influence	No influence
26.	To keep up with others	No influence	Little influence	Moderate influence	Much influence
27.	To improve my social relationships	Much influence	Moderate influence	Little influence	No influence
28.	To maintain or improve my social position	No influence	Little influence	Moderate influence	Much influence
29.	To escape an unhappy relationship	Much influence	Moderate influence	Little influence	No influence
30.	To provide a contrast to my previous education	No influence	Little influence	Moderate influence	Much influence
31.	To comply with the suggestions of someone else	Much influence	Moderate influence	Little influence	No influence
32.	To learn just for the sake of learning	No influence	Little influence	Moderate influence	Much influence
33.	To make new friends	Much influence	Moderate influence	Little influence	No influence
34.	To improve my ability to participate in community work	No influence	Little influence	Moderate influence	Much influence
35.	To comply with instructions from someone else	Much influence	Moderate influence	Little influence	No influence

PLEASE CIRCLE THE APPROPRIATE NUMBER TO INDICATE, ON THE AVERAGE, HOW MUCH YOU PARTICIPATED IN THE FOLLOWING ACTIVITIES DURING 1975. JUST THINK OF YOUR ACTIVITIES FOR 1975.

Circle the appropriate number

- |   |  |
|---|--|
| 1. I attended movies, plays or concerts   | 1. Once a week<br>2. Once a month<br>3. Once every 6 months<br>4. Once a year<br>5. Not at all |
| 2. I read a newspaper   | 1. Every day<br>2. Twice a week<br>3. Once a week<br>4. Once a month<br>5. Once a year         |
| 3. I helped care for another person (other than spouse)   | 1. Every day<br>2. Once a week<br>3. Once a month<br>4. Once a year<br>5. Not at all           |
| 4. I took an overnight (or longer) pleasure trip  | 1. More than 3 times<br>2. Three times<br>3. Twice<br>4. Once<br>5. Not at all                 |
| 5. I participated in volunteer community work   | 1. Every day<br>2. Once a week<br>3. Once a month<br>4. Once a year<br>5. Not at all           |
| 6. I attended meetings of an organization, association or club  | 1. Once a week<br>2. Twice a month<br>3. Once a month<br>4. Once a year<br>5. Not at all       |
| 7. I read books for the purpose of learning about something (e.g. gardening, politics, art, psychology) | 1. Every day<br>2. Once a week<br>3. Once a month<br>4. Once a year<br>5. Not at all           |

PAGE TWO

PLEASE CIRCLE THE APPROPRIATE NUMBER. JUST THINK OF YOUR ACTIVITIES FOR 1975

- 
8. I attended a hobby or craft group
1. Every day
  2. Once a week
  3. Once a month
  4. Once a year
  5. Not at all
- 
9. I visited with neighbors or friends (do not include relatives)
1. Every day
  2. Twice a week
  3. Once a week
  4. Once a month
  5. Once a year
- 
10. I attended adult education courses at night school, university extension, community centers or other agencies
1. 4 or more courses
  2. 3 courses
  3. 2 courses
  4. 1 course
  5. None at all
- 
11. I carried on a conversation with a stranger on a bus, at a park, or in some other public place
1. Every day
  2. Once a week
  3. Once a month
  4. Once a year
  5. Not at all
- 
12. I visited with relatives in their home or apartment.
1. Every day
  2. Once a week
  3. Once a month
  4. Once a year
  5. Not at all
- 
13. I talked socially over the phone
1. Every day
  2. Twice a week
  3. Once a week
  4. Once a month
  5. Once a year
- 
14. I voted in the last Federal election
1. Yes
  2. No
- 
15. I voted in the last Provincial election
1. Yes
  2. No
- 
16. I voted in the last Municipal election
1. Yes
  2. No
-

CONFIDENTIAL

PLEASE ANSWER THE FOLLOWING QUESTIONS ACCORDING TO WHETHER FOR YOU THE ANSWER IS MAINLY "YES", OR MAINLY "NO"

	<u>YES</u>	<u>NO</u>
1. Reduced strength keeps me from doing the things I need to do		
2. One can learn to live a good life even in reduced health		
3. I manage to live a good life even with limited income		
4. Retirement is as worthwhile as work		
5. I find it (or would find it) difficult to live alone		
6. A surviving husband or wife can learn to get along		
7. I avoid being with old people		
8. Making new friends is hard for me		
9. I still do many worthwhile things		
10. Younger people can do most things better than older people		
11. My living arrangements suit me fine		
12. I would be satisfied only living in my own household		
13. Family and friends help when I have troubles		
14. I could accept being dependent on my children or on others		

CONFIDENTIAL

PLEASE ANSWER EVERY QUESTION, CHECKING WHETHER YOU MAINLY AGREE OR MAINLY DISAGREE

	<u>AGREE</u>	<u>DISAGREE</u>
1. As I grow older, things seem better than I thought they would be		
2. I have gotten more of the breaks in life than most people I know		
3. This is the dreariest time of my life		
4. I am just as happy as when I was younger		
5. My life could be happier than it is now		
6. These are the best years of my life		
7. Most of the things I do are boring or monotonous		
8. I expect some interesting and pleasant things to happen to me in the future		
9. The things I do are as interesting to me as they ever were		
10. I feel old and somewhat tired		
11. As I look back on my life, I am fairly well satisfied		
12. I would not change my past life even if I could		
13. Compared to other people my age, I make a good appearance		
14. I have made plans for things I'll be doing a month or a year from now		
15. When I think back over my life, I didn't get most of the important things I wanted		
16. Compared to other people, I get down in the dumps too often		
17. I've gotten pretty much what I expected out of life		
18. In spite of what some people say, the lot of the average man is getting worse, not better		

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