Words on Wisdom:

Perspective Transformation in a "Learning in Retirement Institute"

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Abstract

In this study, 7 men and women with an average age of 77 were interviewed regarding their experience of attending courses at a Learning in Retirement Institute (LRI) in southern Ontario. The purpose was to explore the role of wisdom in the learning of these retirees. Explicit theories of wisdom developed by selected philosophers, psychologists, and religious thinkers were compared to the implicit theories of wisdom that respondents expressed. Further comparisons were drawn between these implicit theories of wisdom and the act of perspective transformation in transformative learning. Some evidence was found that the development of wisdom compares favourably to perspective transformation, especially with regards to the behavioural changes associated with critical self-reflection. Among all the respondents, those 3 LRI students who had also moderated courses indicated that they had experienced the most opportunities for critical self-reflection. These 3 also expressed deep satisfaction in having been able to put their learnings to use as teachers. A recommendation of this study is that opportunities for sharing and acting upon the results of discourse within Learning in Retirement Institutes should be implemented. In the absence of evaluation, opportunities for praxis (such as co-op placements) must be developed so that students can measure their success against objective criteria and hence attach meaning to their studies.
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CHAPTER ONE: THE PROBLEM

Great wisdom may resemble foolishness.

(Lao-tzu, 6th Century B.C.)

When we think of retirees as lifelong learners, quaint images of candle making and other hobbyist activities might naturally spring to mind. Encapsulated in the notion of retirement in the contemporary Western world is a prevailing expectation that the retiree will want to avoid many of life’s more taxing experiences, such as learning that requires extended periods of concentration. Nevertheless, there are older adult learners who embrace the opportunity to challenge their minds. Contrary to popular stereotypes, these men and women gravitate to activities requiring analysis, synthesis, and evaluation, which are skills found in the higher three levels of learning in Bloom’s Taxonomy (1956). Following the revised version of this taxonomy (Anderson & Krathwohl, 2001), these would be referred to as analyzing, evaluating, and creating. In order to exercise these abilities, many older men and women enrol in courses offered by institutions affiliated with or modeled after the international movement known as University of the Third Age (U3A). The experience of students enrolled in various liberal arts courses at one such Learning in Retirement Institute (LRI) in Ontario has been my focus.

Throughout this study, I explore what I perceive to be the relationship between the development of wisdom as a psycho-social task late in the life course (Erikson, 1982), and the learning experience known as perspective transformation (Mezirow, 1978, 1991). Perspective transformation is a defining feature of transformative learning, a theory first introduced by Mezirow in 1978. The change of perspective refers to how an adult
becomes critically aware of his or her assumptions and how, as a result, new ways of thinking and behaving are adopted. It has occurred to me that if a much older adult were to experience this change of perception, the development of wisdom might be identifiable as an outcome. This idea has directed my line of inquiry.

Note that throughout this document I refer to “retirees,” “older adults,” “senior citizens” and “older adult learners.” These terms are intended to be used interchangeably. They signify men and women over age 55 that are no longer attached to the workforce. That being said, those who participated in this study were in fact 71 years of age and older. As a result, I have also used the word “elderly” throughout. Further, the terms “participant” and “respondent” are both intended to refer to those men and women who were kind enough to grant me interviews for this study.

Background of the Problem

Lifelong learning needs to be reassessed for its meaning in contemporary Canadian society. Not only is life expectancy increasing, but also the so-called baby-boom generation is rapidly approaching the traditional age of retirement (Statistics Canada, 2005). The first wave of this population—those born in 1946—will turn 65 in 2011. By the year 2026, an estimated 7.8 million Canadians will belong to this demographic (Statistics Canada, 2004b). A revived interest in learning has already begun to draw many retirees to centers of education. In Canada, enrolment in older adult learning organizations is increasing. A poll conducted in 2003 by The Canadian Network for Third Age Learners revealed that an estimated 60,000 older adults were already actively involved in lifelong learning programs. In the U.S., postsecondary institutions
and other continuing education organizations are realizing a steady rise in the enrolment of adults age 55 and older (U.S. Department of Education, 2001). This is not surprising, given the demonstrated link between a higher level of early-life education and an individual’s predisposition to engage in lifelong learning (Statistics Canada, 2004a). As we are reminded by Laurant (2006), the growing surge of senior citizens in North America is better educated than any earlier generation. We can expect the demand for late-life educational opportunities to increase proportionately to the retiring population.

Thinking specifically of those who belong to the first wave of baby-boom retirees, history informs us that these men and women have been activists since their adolescence in the 1960s (Spann, 2003). In middle adulthood, they continued to challenge conventional expectations, particularly regarding social roles. If their past performance as catalysts of change can be used as an indicator of future behaviour, it seems likely that many from this group will question assumptions about the meaning of retirement and the appropriate conduct of retirees. Prevailing attitudes toward learning are among the conventions that maverick retirees might address. Roadblocks to inclusion, such as age discrimination, could be tackled. That such discrimination exists within our educational system might not, however, be immediately evident. Only by examining what is valued in education and asking whose needs are being met can we hope to understand why the continuing education of the elderly is not more widely advocated and funded.

In North America, lifelong learning is often calculated in terms of economic benefit (Atchley, 1993). One’s ability to contribute to the production of goods and services is a frequent rationale for continuing education. By focusing on the human
capital exemplar of adult learning, however, one falls prey to the contested view that our country’s economic prosperity is inextricably tied to increasing levels of education and training (Bouchard, 1998). As a result, our society tacitly supports the attitude that retirement from work signals the natural terminal point for serious study (Courtenay, 1989). This assumption is problematic for a number of reasons, not the least of which is the increased longevity in post-Industrial era nations such as ours.

While health and independence are certainly among the benefits of lifelong learning for the older adult, these are by no means the only positive outcomes. I maintain that one of the significant noneconomic benefits is the development of critical thinkers. Giroux (2003) is a chief proponent of the view that the historic mission of higher education is to produce scholarship in the service of an inclusive democracy. Holding this to be true, I suggest that members of a vigorous participatory political system should want to nurture senior citizens as a critically reflective resource. In order to facilitate this cultivation in Canada, I believe that we need to better understand those older adult learners who enrol in postsecondary programs. This stance has both inspired and directed my study.

To date, relatively little research has been conducted regarding the senior citizen as learner. In 1993, Bynum and Seaman surveyed 452 adults over age 55 to discover the motivators for attending an LRI. They used a 20-item measurement scale that was organized to address four possible reasons for attending an LRI: perceived cognitive gaps, curiosity, self-actualization, and social contact. Using this same scale, Picton and Yuen conducted a cross-cultural survey in 1998. As was the result in the earlier study,
curiosity and perceived cognitive gaps were indicated as the strongest motivators for learning. In 2004, Kim and Merriam used Boshier’s Education Participation Scale (EPS) to perform a similar survey in an LRI. Once again, a desire for intellectual stimulation was found to be the highest motivating factor.

The aforementioned studies, as well as being few in number, were also survey based, using predetermined categories chosen by the researchers. By contrast, there is a dearth of descriptive information available from the perspective of the older adult learner. Those who have paused to consider the lived experience of these learners have, however, arrived at some intriguing hypotheses. Thornton (1987) proposes that the intrinsic motivator for late-life learning might be the desire to develop wisdom. Others have supported this view. Erikson (1982; Erikson, Erikson & Kivnick, 1986) writes that the quest for wisdom is a feature of ideal late life psychological development. Wisdom, from this standpoint, is the adaptive strength that emerges from a successful negotiation of the developmental stage referred to simply as old age. By engaging in study during late life, the learner may be attempting to execute what Erikson terms a psycho-social task. My premise, at the outset of this study, was that an ideal feature of this psycho-social task could in fact be what Mezirow (1978, 1991) identifies as a transformative learning experience. It occurred to me that older adult learners might facilitate the transformative event when they attempt higher order learning. Those who enter U3A and similar programs, therefore, would avail themselves of optimal psycho-social development through transformative learning and the development of wisdom.

As noted by Moody (1986, 1993), late-life learning does not necessarily involve
intellectual satisfaction. Although cognitive needs may be the expressed or explicit motivators, the older adult learner may in fact be responding to needs that correspond to a developmental task. Affective learning in the service of a late-life psycho-social stage should also be considered as a possible motivation. Ardelt (2000) concurs with this view, identifying the possible connection between late-life learning, wisdom, and personal transformation. She notes that the older learner, who can afford the luxury of reflective and dialectic thinking, is ideally suited for the task of wisdom acquisition. Interaction with others, and a willingness to be transformed in the process, is Ardelt’s prescribed activity for the attainment of wisdom-related knowledge. Sternberg (2005), acknowledging the existence of this transformative event, concludes that the most desirable outcome is a metacognitive stance identified as wisdom. He proposes a balance theory, which posits wisdom as an ideal condition involving “the application of tacit knowledge toward the achievement of a common good through a balance among intrapersonal, interpersonal and extrapersonal interests” (Sternberg & Lubart, 2001, p. 507). Those who achieve this state succeed in coalescing both practical and academic intelligence.

Problem Statement

Knowles (1980) proposes that an adult’s readiness to learn becomes increasingly oriented to the developmental tasks of his or her social roles. This is echoed by Cranton in 1994. She refers to three learning domains identified by Mezirow in 1991: instrumental, communicative, and emancipatory. These were derived from Mezirow’s interpretation of Habermas (1971, 1984), a social theorist and philosopher who classified
human interests and knowledge. Cranton notes that critical reflection, which occurs in the communicative domain, is most likely to happen as one progresses through the developmental stages of adulthood. Both Knowles and Cranton acknowledge a link between the developmental stage in an adult's life and the type of learning that he or she most naturally welcomes. If we accept this premise, we might also surmise that an adult uses education to improve performance during a perceived developmental stage, or even as a means of accelerating the process. The more intellectually demanding the education, it seems reasonable to suggest, the greater the possible gains. For example, a young adult who engages in a challenging program of study is likely to achieve rewards that are satisfying on both a cognitive and affective level. Changes in attitude and behaviour could be predicted. The student might anticipate these outcomes but likely cannot imagine the scope of the experience. It is a perceived need that may or may not be attached to other expectations, such as the tangible reward of employment.

By the same token, an older adult might predict that a demanding program of study could produce cognitive and affective rewards. If this older student were to have reached the point when he or she is no longer seeking employment, these intangible rewards would then in fact be the primary motivators for learning. The execution of a late-life developmental task, I propose, may be a tacit objective when the retiree enrolls in postsecondary education. My interest has been in the development of wisdom and the act of perspective transformation as identifiable features of this task. In particular, I am interested in how wisdom and perspective transformation might be executed through the vehicle of study within an LRI program.
Purpose and Theoretical Framework

The purpose of this study was to explore the role of wisdom in the experience of older adults who have attended LRI courses during or just before full retirement. Theoretical guidance has been derived from writing concerned with the learning process of older adults. Initially, I referred to Erikson’s (1982) stage theory of life course development and Mezirow’s (1991) work on transformative learning. Both authors depict periods during which an adult experiences a significant and lasting change in his or her outlook. Describing these episodes as developmental stages, Erikson identifies old age as a phase during which one struggles to resolve psycho-social tensions with the goal of achieving the adaptive strength of wisdom. Mezirow, describing the adult’s movement toward reflectivity, refers to this type of change as perspective transformation. The intersection of these theories has been central to my purpose. Understanding wisdom as a developmental outcome and transformative learning as the developmental process, I interviewed older adults whom I hoped might have had firsthand experience with this phenomenon. Patterns of experience and commonalities of participant interpretation were sought.

Enlarging upon the concept of wisdom, I found further theoretical guidance in the work of Moody, (1976, 1986), Ardelt (2000, 2004), and Sternberg (1998, 2005). All three have proposed that a relationship exists between the development of wisdom and transformative learning. Thornton (1987, 2003) has also contributed to my theoretical stance through his work in educational gerontology. Specifically, I attend to his notion
that the acquisition of wisdom might be a tacit motivation when challenging courses of study are pursued by much older adults.

It is my intention that this study will contribute to understanding the needs of the older adult learner in Ontario and in LRIs throughout North America. Interview questions were fashioned to elicit any relationships between transformative learning and the development of wisdom as a psycho-social task in the life course. This connection has been proposed by others. Moody (1976) postulates that learning and higher order thinking can trigger a positive late-life developmental stage. Enlarging upon this notion, Courtenay and Truluck (1997) make connections to Mezirow’s transformative learning. Their thoughts on the matter have been of key importance in my study, as they articulate the relationship between education and meaning-making in the lives of older adults.

**Research Questions to Be Answered**

My purpose was to tease out the meaning and role of wisdom in the experience of older adult students who engage in higher education. I planned to discover how my participants defined wisdom, how they experienced wisdom, and how their thoughts on the phenomenon of wisdom related to explicit theories on the matter. Further, I sought evidence of connections between the development of wisdom and the experience identified by Mezirow (1978) as perspective transformation.

Working outward from this central inquiry, other questions arose. Most compelling were those addressing the quality of learning that takes place after retirement. During the years before late middle-age, men and women are more likely to seek knowledge directly applicable to career advancement (Boshier, 1971, 1991; Kim &
Merriam, 2004). For these learners, the assurance of financial stability is the primary goal of adult education. Older adults, however, most often return to school for learning that is not intended to support a vocation (Kim & Merriam). It was in recognition of this that my secondary line of questioning evolved. During interviews, I asked questions regarding why my research participants had chosen to enter an LRI. In particular, I looked for evidence that shortly before enrolment in school some might have experienced what Mezirow (1978) refers to as a *disorienting dilemma*. In Mezirow’s view, these dilemmas are acute internal or external personal crises that serve as the catalyst for perspective transformation. I was interested to learn if this type of disorienting circumstance might have caused some of my participants to return to school. Further, if this were found to be the case, I wanted to know how the disorienting dilemma might have affected the participant’s convictions, outlook, and behaviour.

Other questions related to the idea of transformative learning include: How was the return to education experienced? What, if any, critical incidents (Brookfield, 1995) were my older adult learners able to identify in the experience of late-life learning? This particular question related to the possibility that the return to school in itself might have triggered a disorienting dilemma, as was the case with Mezirow’s (1978) study of women returning to school after a long hiatus.

In summary, the questions to be answered were as follows:

1. What is the meaning and role of wisdom (if any) in the experience of older adult students engaged in higher education?

2. Is there evidence of connections between the development of wisdom and the
experience identified by Mezirow (1978) as perspective transformation?

3. Did any of the older adults in my group of participants experience a disorienting dilemma (a) shortly before enrolment in school and/or (b) after enrolment in school?

4. If a disorienting dilemma had occurred (a) what form did it take (b) what role did it play, and (c) how had it affected the participant’s convictions, outlook or behaviour?

5. How was the return to education experienced? Specifically, what, if any, critical incidents were related to the experience of late-life learning?

**Rationale for the Study**

A fundamental rationale for this study is my concern that higher education is considered a pursuit of negligible worth when accessed by students who are over age 55 and have retired from work. This sentiment is echoed by Moody (1988), who endorses the notion that the ability of the older adult to learn and to teach is greatly underestimated. Although senior citizens are not discouraged from enrolling in postsecondary programs, they are often tacitly diverted to leisure-oriented studies. Moody further critiques the learning available to the older adult as being derived from the social welfare model. Herein, the learner is gently nudged toward education limited to advice on prevention and alleviation of various discomforts. Learning not to overtax the medical and social service systems would be the objective of these types of programs. The cognitive and affective needs of the older adult are not of foremost importance to those who plan and execute this type of curricula.
Ageist stereotypes abound regarding the interests and abilities of the elderly. As noted by Dixon (2000), much gerontology literature focuses on ideas of loss and decline. These notions, which enjoy wide circulation, have contributed to what McGuire, Klein and Couper (2005) refer to as *gerontophobia*: a fear and loathing of old age that prevails throughout Western society. This mindset, as noted by Mehotra (2003), can serve as a self-fulfilling prophecy. The entrenched belief that the elderly have a weakened capacity for intellectual pursuit prevents many older adults from following their academic inclinations. The result can be mental inactivity, which in itself has been linked to cognitive decay (Grady, McIntosh, Springer & Winocur, 2005).

My research, I believe, is important for a number of reasons. Foremost, it is designed to dispel some negative ageist stereotypes. From the outset, my objective has been to contribute to understanding the needs of the contemporary older adult learner, who belongs to a large and historically influential group. The generation that came of age during the 1960s in North America has demonstrated a predilection for rebellious and inventive behaviour. At age 65, many from this age cohort will find themselves affluent to a degree not experienced by previous generations. The health and lifespan of these men and women are both also expected to exceed that of preceding generations (Spann, 2003). Taking these factors into consideration, many seniors at the front end of the baby boom will likely look to old age not as a time of retirement but rather as a time of renaissance (Roszak, 1998). In preparation for what could be a groundswell of interest in lifelong learning, the experience of higher education among older adults in Canada must be understood.
Ultimately, my study might be of use to those who must prepare not only LRIs but also other of our nation's higher learning institutes for a dramatic influx of learners. By their sheer number, the coming wave of retirees holds the potential to change our society's approach to lifelong learning. However, before change occurs, the extrinsic and intrinsic value of making education more accessible to older adults must be articulated. My research, I believe, will contribute to this dialogue.

Moreover, the rationale for my study was the desire to fill a gap in the literature and to address some previously overlooked factors in the discussion of education for the older adult. Much work on this subject to date has been quantitative or purely theoretical (see Chapter Two for discussion). Of this, little has focused on Canadian learners.

**Scope and Limitations of the Study**

Those who had completed at least two courses in an LRI program were included in my target group for interviews. I sought men and women who were retired or semiretired and age 55 and older. I was interested in this group because they were most likely to attend school for reasons unrelated to vocational aspirations. Further, a study by Kim and Merriam (2004) regarding the motivations of students attending a Learning in Retirement Institute had examined men and women from the same age group. I further limited my participants to those who had taken courses that they perceived to be intellectually stimulating. To reiterate from earlier in this chapter, I was interested in those adult learners who gravitated to activities requiring analysis, synthesis, and evaluation. Seminar-style classes that encouraged dialogue were the focus of my study. In selecting an LRI as my source of participants, I excluded from consideration those older
adults taking classes within mainstream programs at colleges or universities. In that LRIs generally do not provide recognition for learning, such as diplomas, they are more likely to attract learners whose motivations are unrelated to recognition or prestige.

Because of my geographic location, I sought and was successful in gaining access to an LRI easily accessible from my home in southern Ontario. My initial goal was to interview between 6 and 8 students. Ultimately, 7 interviews were completed, at which point I felt that theoretical saturation had been reached. At the outset, it was my intention to interview an equal or nearly equal number of male and female participants. A sample of those born and educated outside of Canada was also considered highly desirable, in that this would add cultural diversity to the mix. Although I initially acknowledged that I might need to compromise in both of these areas, I was pleased with the variety found in my participants. Nevertheless, it must be emphasized that although gender and culture may have an impact on how participants interpret the experience of attending an LRI, these contextual elements were not the focus of my study.

Also outside the scope of my research were such practical considerations as program length, classroom environment, and method of evaluation. It was not my intention to examine the experience of attending an LRI from an administrative perspective.

Overview

In this first chapter, I have explained the problem addressed in my study. My overriding interest has been to determine the relationship, if any, between perspective transformation and the development of wisdom as a task in the life course. This study has
been developed from the standpoint that both individually recognized benefits and benefits to society as a whole are recognized when older adults participate in challenging programs of study. As a rationale for this research, I suggest that the demographics in Canada are such that a groundswell of interest in lifelong learning might naturally occur as baby-boomers begin to reach age 65 in the year 2010. For theoretical guidance, I refer to Erikson’s (1982, Erikson et al., 1986) theory of life course development, Mezirow’s (1978, 1991) work on transformative learning, Sternberg’s (1998, 2005) balance theory of wisdom, and the work of Moody (1976, 1986) and Ardelt (2000, 2004), who both propose that a relationship exists between transformative learning and the development of wisdom.

In Chapter Two, I describe the literature I have reviewed. This is presented within the framework of three conceptual themes, which serve as headings: Perspective Transformation, The Development of Wisdom and Educational Gerontology. Although the bodies of literature discussed within each theme belong to a distinct field of inquiry, I address intersections of theory, especially as they apply to my sampled population.

Chapter Three presents the method used to conduct the study. From the outset, my assumption has been that the experience of higher education for the older adult learner might be qualitatively unique. To investigate this premise, I conducted interviews with 3 men and 4 women who had attended or were continuing to attend an LRI in a southern Ontario city. This chapter outlines how, through purposive sampling, key informants were found. I also describe the selection criteria, my method of coding and the identification of patterns and themes.
In Chapter Four, I consider the findings of this study. I begin with key biographical information regarding each of my research participants. Analysis and interpretation of the findings can be found under the following headings: Motivation for Attending an LRI, Self-Directed Learning, Gender-Based Differences in Late-Life Learning, Disorienting Dilemmas, Interrupted Narratives, Critical Reflection, Resisted Perspective Transformation, Meaning Perspectives, and Wisdom.

Chapter Five provides a synthesis of the study and compares the results of my analysis to existing theories. Contributions to the pool of knowledge in the field will be suggested. Limitations of my study, implications for practice, and recommendations for future study will also be discussed. The chapter concludes with reflections on the topics of learning in retirement, wisdom, and perspective transformation.
CHAPTER TWO: LITERATURE REVIEW

Wisdom lies neither in fixity nor in change, but in the dialectic between the two.

(Octavio Paz, Times. London, June 8, 1989)

In preparing this thesis, I have performed a literature review that by necessity at times stepped outside the boundaries of what one might generally consider the prescribed readings for a student of adult education. My readings on transformative learning are perhaps the most wholly dedicated to the field. Cranton (1994), Mezirow (1978, 1997), and Taylor (1998) have been consulted for their description and interpretation of perspective transformation. Cited articles on the idea of wisdom have been authored by those with affiliation to the fields of philosophy and psychology. My readings on the epigenetic life scheme proposed by Erikson (1982, Erikson et al., 1986) belong to the field of developmental psychology. Of pertinence to my study is the eighth stage in this scheme, simply referred to as old age. My interest relates specifically to Erikson’s description of the individual’s struggle to develop wisdom.

Educational gerontology readings are a conundrum, as the term itself is interpreted variously. As a result, literature that comes under the description of educational gerontology can concern (a) the education of the older adult learner (b) the education of those who will work with the elderly, and (c) the educational field of gerontology. For my purposes, I have focused on readings that concern the education of the older adult learner. In particular, I have attended to Moody (1976, 1986) and Thornton (1987, 2003), who are considered foundational writers in the field.

Mezirow’s (1978, 1991) theory of transformative learning became pertinent to my
research not before but rather after I had started developing a problem statement. My initial focus was the development of wisdom among older learners. That a relationship might exist between transformative learning and wisdom was a proposition that I could not ignore after finding suggestion of this link more than once in the literature consulted. In particular, I have attended to the idea of wisdom being an outcome of what Mezirow (1978, 1991) referred to as perspective transformation. In my research, I interviewed older adult learners with an average age of 77 and obliquely asked if they could identify a learning experience that conformed to the description of a perspective transformation. Further, I asked if there was a perceived acquisition of personal wisdom as a result. When this was found to be the case, literature was used to analyze and explicate the lived experience of the research participants. When this was not found to be the case, other interpretations were sought.

I present my literature review within the framework of three conceptual themes. These themes, which will serve as headings, describe my theoretical grounding and delineate the territory I have travelled with my research. They are: Perspective Transformation, The Development of Wisdom, and Educational Gerontology.

**Perspective Transformation**

Perspective transformation (Mezirow, 1978, 1991) theorizes a process through which adults revise their meaning structures. These meaning structures act as culturally defined frames of reference that include both meaning schemes and meaning perspectives. Meaning schemes, which develop through our interpretation of experience, can be witnessed in our attitudes and behaviour. Meaning perspectives are comprised of
our many meaning schemes. They provide us with the standards through which we judge and evaluate. A meaning perspective is, in essence, a personal frame of reference. Within this frame of reference, according to Mezirow (1997), are two dimensions: habits of mind and a point of view. The first of these—habits of mind—are our customary ways of thinking and feeling. They are in turn expressed through our various points of view. Kegan (2000) elaborates on the subject of frames of reference, noting that they have moral, cognitive, affective, interpersonal and intrapersonal aspects. He points out that "at its root, a frame of reference is a way of knowing" (p. 52).

Meaning perspectives reflect the way we were socialized and how we were encouraged to understand and organize reality. Mezirow (2000) postulated six varieties of meaning perspective: epistemic, sociolinguistic, psychological, moral-ethical, philosophical and aesthetic. The first of these, epistemic, relates to how people learn.

Sociolinguistic meaning perspectives pertain to social norms and cultural expectations. Psychological meaning perspectives relate to one’s self-concept. Moral-ethical and aesthetic meaning perspectives are self-explanatory, while philosophical perspectives relate to both religious doctrines and one’s worldview. New experiences are all first scrutinized by our meaning perspectives, which either accept or reject the learning. When an incongruent experience is encountered, it is either (a) discarded or (b) the meaning perspective is transformed. The result of this perspective transformation is "a more fully developed (more functional) frame of reference . . . one that is more (a) inclusive, (b) differentiating, (c) permeable, (d) critically reflective, and (e) integrative of experience" (Mezirow 1996, p. 163).
Transformative learning can be understood as the umbrella experience under which perspective transformation occurs. Resulting from his study of 83 women attending college after a hiatus from formal education, Mezirow’s (1978) initial depiction of transformative learning described a 10-phase process involving movement from personal crisis through self-examination to reintegration. The 10 phases are as follows: (Mezirow, 2000, p. 22):

1. A disorienting dilemma
2. Self-examination with feelings of guilt or shame
3. A critical assessment of assumptions
4. Recognition that one’s discontent and process of transformation are shared and that others have negotiated a similar change
5. Exploration of options for new roles, relationships, and actions
6. Planning a course of action
7. Acquisition of knowledge and skills for implementing one’s plans
8. Provisionally trying out new roles
9. Building of competence and self-confidence in new roles and relationships
10. A reintegration into one’s life based on conditions dictated by one’s new perspective.

In subsequent years, Mezirow expanded his initial framework, drawing more heavily upon the work of Habermas (1971, 1984) for theoretic direction. In 1991, Mezirow offered his concept of adult learning as an experience occupying three domains: instrumental (concerning cause-effect, and problem solving through empirical
inquiry), communicative (understanding the perceptions of others and making oneself understood), and emancipatory (when one indulges in critical reflection with the outcome of liberation from taken-for-granted ideas and assumptions). It is in the emancipatory domain of learning, according to Mezirow, that transformative learning often takes place. Mezirow (1991) describes emancipatory learning as freedom from libidinal, linguistic, epistemic, institutional or environmental forces that limit our options and our rational control over our lives that have been taken for granted or seen as beyond human control. These forces include misconceptions, ideologies, and psychological distortions in prior learning that produce or perpetuate unexamined relations of dependence. (p. 87)

Ardelt (2000) arrives at a similar proposal through her examination of wisdom. In her taxonomy, intellectual thought is presented as primarily linear and belonging to Piaget’s (1970) final stage of formal operations. In Ardelt’s scheme, intellectual thought stands as a category, containing the accumulation of new descriptive knowledge and information. I see this corresponding to Mezirow’s (1991) communicative learning. As the next step in her taxonomy, Ardelt presents wisdom-related knowledge. This I see as comparable to what Mezirow describes as emancipatory learning. Both emancipatory and wisdom-related learning belong to a constructivist perspective, as both reject the assumption of objective reality, and knowledge is understood to be created by the individual. For illustration of the parallels I see between the taxonomies of Mezirow and Ardelt, see Table 1.
Table 1
Mezirow’s Learning Domains as Compared to Ardelt’s Wisdom-Related Knowledge

<table>
<thead>
<tr>
<th>Mezirow: Learning Domains</th>
<th>Ardelt: Wisdom-related Knowledge</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Instrumental</strong></td>
<td></td>
</tr>
<tr>
<td>Concerning cause and effect–problem solving through empirical inquiry</td>
<td>Formal operational thought (Piaget)</td>
</tr>
<tr>
<td><strong>Communicative</strong></td>
<td></td>
</tr>
<tr>
<td>Understanding the perceptions of others and making oneself understood</td>
<td>Intellectual knowledge</td>
</tr>
<tr>
<td><strong>Emancipatory</strong></td>
<td></td>
</tr>
<tr>
<td>Critical reflection with the outcome of liberation from taken-for-granted ideas and assumptions</td>
<td>A combination of cognition and self-reflection–transcendence of one’s subjectivity</td>
</tr>
</tbody>
</table>
In his description of wisdom, Csikszentmihalyi (1990) portrays postformal thinking as a stage of optimal adult development. In this level of functioning, “one recognizes the relativity of various formal systems through life experience and is able to assume contradictory points of view” (p. 30). Although they do not propose a taxonomy, Csikszentmihalyi and Nakamura (2005) summarize the traits of the wise by drawing upon a variety of texts, from the Old Testament forward. These traits include the capacity to contextualize information, the ability to understand the limits of knowledge, acceptance of ambiguity, and the facility to probe beyond superficial meanings. When we look to Mezirow’s (1991) description of the liberation that occurs with emancipatory learning, we come across a similar list. The emancipated learner is freed from “misconceptions, ideologies, and psychological distortions in prior learning that produce or perpetuate unexamined relations of dependence” (p. 87). Differing from Mezirow’s view of how this occurs, however, Csikszentmihalyi and Rathunde (1990) indicate that time, experience, and the will to reach this state of intellectual freedom are essential. Unlike Mezirow’s 10-step taxonomy of stages for achieving transformative learning, Csikszentmihalyi proposes a more organic model that involves the development of proficiency in cognitive and affective areas through practice.

The kind of knowledge – or wisdom – one needs for emancipating consciousness is not cumulative. It cannot be condensed into a formula; it cannot be memorized and then routinely applied. Like other complex forms of expertise, such as mature political judgment or a refined aesthetic sense, it must be earned through trial-and-error experience by each individual, generation after generation. At least as
much as intelligence, it requires the commitment of emotions and will. It is not enough to know how to do it; one must do it, consistently, in the same way as athletes or musicians who must keep practicing what they know in theory. (1990, p. 21)

Another reason for suggesting that emancipatory and wisdom-related knowledge are in fact the same experience relates to the manner in which one acquires and maintains these states of being. Discursive, dialectic modes of thinking are presented as essential to both. Ardelt (2000) portrays wisdom-related knowledge as being the outcome of discourse. Mezirow (1997), presenting the significance of discourse in emancipatory learning, describes it as “a dialogue devoted to assessing reasons presented in support of competing interpretations, by critically examining evidence, arguments and alternative points of view” (p. 6). To illustrate how discourse can aid in the examination of assumptions, Mezirow (1998) refers to The Dialogue Project at MIT’s Centre for Organizational Learning. This program brings groups of learners together to discuss shared assumptions. Through the examination of habitual ways of thinking, the members of the group come to understand the processes and paradigms used to arrive at their judgements. Interestingly, the Max-Planck Institute for Human Development and Education employs a similar method for examining the development of wisdom (Staudinger, Smith, & Baltes, 1994). This experiment is known as the Berlin Wisdom Paradigm. As has been repeatedly observed through this experiment, when an individual is partnered with another and asked to engage in dialogue to consider the meaning, implications, and best course of action in a life dilemma, he or she will perform better
than when asked to consider the dilemma independently. In essence, the Berlin Wisdom Paradigm has demonstrated than two heads are wiser than one.

Central to the transformative learning experience is the act of critical reflection. This differs from ordinary reflection in that it can be understood as the act of moving beyond basic awareness. The individual reflecting critically will question how certain presuppositions were reached, and will assess their validity. As Brookfield (1995) reminds us, “reflection is not, by definition, critical” (p. 8). In itself, reflection implies a state of heightened awareness in a number of areas. Demarcating the range for reflection, Mezirow (1998) includes awareness of actions, perception, thought, disposition, intention, and one’s habits in these regards. He categorizes reflection (1990) into three groups. The first of these, content reflection, involves contemplation upon the substance of what we think. The second is process reflection, which involves considering how we act on our perceptions. The third, most sophisticated type is referred to as premise reflection. In this mode of thinking, we consider the roots of our thinking and behaviours. It is out of premise reflection that critical reflection can arise.

In Mezirow’s (1998, 2000) framework, there are two methods of critical reflection through which one can attain transformative learning. The first of these he refers to as objective reframing. In this type of critical reflection, one considers and evaluates the assumptions of others. Mezirow proposes that critical reflection can be (a) narrative, in which form one assesses paradigms and canon, and (b) action, where the objective is to improve performance.

The second type of reflection is referred to as subjective reframing (Mezirow,
In this instance, the individual engages in critical self-reflection about one’s assumptions regarding a system, an organization, feelings, or the way one learns. Subjective reframing can also occur when one applies the meaning of another’s narrative to one’s own lived experience. Within the act of subjective reframing in critical self-reflection, Mezirow (1998) proposes a taxonomy. The levels of reflection and reframing include: *narrative, systemic, organizational, moral-ethical, therapeutic, and epistemic*.

Mezirow’s description of the layers of critical reflection and critical self-reflection correspond to Brookfield’s (1995) less complex yet compelling taxonomy of *paradigmatic, prescriptive, and causal* assumptions for critical reflection. The first of these, *paradigmatic assumptions*, exist as the manner in which we categorize life experience. The second type of assumption, referred to as *prescriptive*, relates to our beliefs regarding what should take place in various situations. The third type is referred to as *causal assumptions*. These assumptions are derived from our understanding of how the world works and how it might be changed. At the root of this taxonomy is Brookfield’s (2000) conviction that critical reflection cannot truly take place unless one performs an analysis of the power structure at work within the learning experience. He contends that all education has a political dimension insofar as issues of dominance, resources, and competing discourses operate in the background, determining what is taught. I would go further and suggest that the issue of who is taught—for example, whether or not older adults should claim equal access to learning—is the type of power issue upon which one might critically reflect.

As Cranton (1992, 1994) and Mezirow (1998) tell us, critical self-reflection
involves an assessment of the manner in which one has posed problems and an assessment of one’s meaning perspectives. Through discussion, reading, experience, or some combination of all three learning methods, an individual comes to perceive those discrepancies between what was previously held to be true and what has since been discovered. Taylor (1998) remarks that, through critical self-reflection of assumptions, “we are free from cultural distortions and constraints, allowing for open discourse” (pp. 9-10). One might naturally expect that the self-reflective learner would abandon some amount of rigidity and dogmatism as the result of successful critical self-reflection. Hence, the self-reflective learner would display the characteristics of open-mindedness and a heightened tolerance for ambiguity, which are both characteristics acknowledged to be among the most common hallmarks of wisdom (Csikszentmihalyi, 2005; Sternberg, 1990; Takahashi & Bordia, 2000).

Ardelt (2000), considering the topic of wisdom, also discusses the role of self-reflective thinking. In her framework, self-reflection is seen as the manner of thinking that allows one to transcend subjectivity. Moreover, she suggests that the longer one practices this manner of thinking, the more likely one is to arrive at a state of mind where wisdom can emerge. The passage of time in self-reflective thinking is presented by Ardelt as a necessary element in the process. On a similar note, Mezirow (1991) acknowledges work by Labouvie-Vief and Blanchard-Fields (1982) regarding perspective transformation in aging. He accepts their premise that progressive perspective transformations during middle adulthood might be responsible for qualitatively different cognitive functioning in the elderly.
Although transformative learning does not necessarily occur in tandem with formal schooling, it can be the result of a program of adult education. The predisposing element is what Mezirow (1978) refers to as a *disorienting dilemma*, the first in a 10-phase process that ultimately leads to transformative learning. The dilemma comes in the form a life crisis that causes one to abandon ordinary *habits of mind*. As noted by Brookfield (1995), these crises can be positive in nature and are not only the result of a negative incident. For example, the death of a spouse or the acquisition of a sudden fortune might cause one to look critically at oneself, others, and various aspects of society. An occasion when learning has resulted from one personally significant and memorable occurrence is referred to by Brookfield (1990) as a *critical incident*. In the classroom, any learning that inspires one to step back from usual assumptions is a potentially transformative critical incident.

As a specific style of communication, rational discourse plays an evaluative role. It is used when the authenticity, appropriateness, truth, comprehensibility, and credibility of the speaker or the spoken thought are being drawn into question. Hence, a disorienting dilemma must be accompanied by this specific type of reasoning in order for the affected individual to experience change. A single event can trigger a disorienting dilemma, as can *integrating circumstances*, as is suggested by Clark (1993) and also by Courtenay, Merriam and Reeves (1998). The integrating circumstances are those conditions which, over time, serve to help someone find new meanings and perhaps new directions in his or her life. Supporting this view, Daloz (2000) argues against the idea that epochal and isolated events might serve as disorienting dilemmas. Nevertheless, he supports the idea
that many such events can exert a cumulative and life-altering effect upon an individual. The result of this series of gradual disorienting dilemmas might be an individual’s predisposition to try on new roles in life, such as returning to school.

The elderly, with a lifetime of relationships and circumstances to draw upon, might certainly have access to a greater range of potentially disorienting dilemmas than would a younger adult. Nevertheless, the older adult can choose a lifestyle of seclusion, hence limiting access to discourse. Jordan (2005) bemoans modern society’s tendency to remove older adults to communities where their cognitive abilities are seldom challenged. She draws upon work done at the Max-Planck Institute for Human Development and Education (Staudinger et al., 1994) to provide evidence that the older men and women who score highest for the development of wisdom are in fact those who have access to discourse with others. As with the process of transformative learning, the process of wisdom acquisition seems to depend upon communication, community, and the ability to indulge in critical thinking. The potential for learning is apparently lessened when one does not explore new ideas with others. As Taylor (1998) attests, access to rational discourse is “the essential medium through which transformation is promoted and developed” (p. 10). Mezirow (1998) is somewhat more cautious in offering his approval of discourse as a means of transformation, noting that the company one keeps will have an impact on the level of discursive analysis available. A novel insight might be carelessly dismissed by a group of unimaginative thinkers or could be brilliant beyond the understanding of one’s peers.

That higher order thinking should be encouraged among the elderly is supported
by Moody (1976). While he acknowledges that Western society does not widely embrace this point of view, he proposes that humanistic psychological growth should, ideally, be the curricular goal of education for the older adult. In later writing, Moody (1986) declares that the task of late-life learning should not be the acquisition of more intellectual or theoretical knowledge but rather the transformative process that accompanies the development of wisdom.

**The Development of Wisdom**

The acquisition of wisdom is a topic that has been addressed by philosophers and theologians throughout the centuries and throughout the world. We find writing on the topic in ancient texts from 5,000 years ago, inscribed on the clay tablets of the Sumerians (Birren & Svensson, 2005). For the Sumerians, wisdom literature amounted to an inventory of good advice that one might follow in the pursuit of a happy existence. Parts of the Old Testament, intended as guides to ideal human behaviour, also address the topic of wisdom. Referred to by many theologians simply as *Wisdom Literature*, included are the canonical books of Job, Proverbs, and Ecclesiastes, the Apocryphal books of Sirach, and the Wisdom of Solomon. Biblical Wisdom Literature is not prescriptive and does not consider the human condition from a divine perspective. Rather, it describes, defines, and attempts to understand how one can achieve optimal well-being. It is a reflective and rational approach to life, concerned with knowledge and the frequent need to grapple with dilemmas, often expressed in the literature as choosing between “two paths” or “two ways” of living (Bratcher, 2006). For the student of transformative learning, a correlation can be found here in the
disorienting dilemmas that precede perspective transformation. Those with an interest in Erikson's (1982) theory of life course development might also see a correlation between the psycho-social crises encountered at each stage of his epigenetic scheme. Confronting a paradox or difficult choice seems to be a feature in personal development throughout the ages.

During the 4th century B.C., Plato and Aristotle wrote on the topic of wisdom. Plato proclaimed that only the divine is capable of being wise (Adler, 1952). Man, in Plato's opinion, can love only the ideal of wisdom. Transmitting the advice of his own teacher, Socrates, Plato admonishes lovers of wisdom to think for themselves and to question everything (Magee, 1998). In the Socratic view, the wise might be illiterate and unschooled, yet nonetheless are distinguishable from others in their innate love of harmony, beauty, and truth. Aristotle, a student of Plato, articulates a distinction between speculative and practical wisdom—sophia and phronesis. Sophia refers to one's ability to think about the world in what we would now refer to as an objective, scientific manner. Phronesis refers to the demeanour of one who has maturity, experience, and the prudence gained through reflection and contextualization. The ultimate goal in life is presented as eudaimonia: the state in which one flourishes and experiences joy. In order to attain this state, one must not only possess but also be ruled by wisdom (Robinson, 1990). Parallels are seen between Aristotle's sophia and Mezirow's instrumental learning and again between phronesis and communicative learning. Aristotle's eudaimonia, however, differs from Mezirow's emancipatory learning in that it is represented as an outcome and a disposition. Emancipatory
learning, by contrast, is depicted as a cognitive process.

Looking to other perspectives on the experience of late-life learning, we find that Erikson et al. (1986) identify *wisdom* as the adaptive strength that evolves from a successful negotiation of the struggle between integrity and despair in old age. They define wisdom as "detached concern with life itself, in the face of death itself" (p. 37). In Erikson's view, wisdom occupies the middle ground between affect and cognition.

In the Christian tradition, St. Augustine (354-430 A.D.) and Thomas Aquinas (1225–1274) integrated their understanding of Greek philosophy with religious dogma in their analysis and description of the nature of wisdom. St. Augustine (1992) considered intelligence to be a composite of wisdom and knowledge of the material world. Aquinas (1947) proposed that wisdom is a science that judges not only conclusions but also the first principles of any matter (Birren & Svensson, 2005). During the Renaissance, Montaigne (1533-1592) portrayed the wise man as one who is aware of his own ignorance. Philosophers who followed over the next 300 years—most notably Descartes, Locke, Kant, and Schopenhauer—further addressed the idea of wisdom, aiming to refine its definition and assess if and how men could achieve this desirable state of being (Birren & Svensson). This striving for precise explanations and classifications of wisdom is a feature that characterizes wisdom writings of the West from those of the Far East. Eastern interpretations often embrace noncognitive domains of wisdom, with a particular focus on the integrative and transformative features (Takahashi & Overtor, 2005).

Wisdom, in the East, generally refers to understanding through the mediation of
emotional involvement without overt intellectualization. Among the most noted wisdom thinkers of the Eastern tradition was Siddhartha (563-483 B.C.), who purported wisdom to be the consequence of personal observation coupled with life experience. Another notable thinker was Confucius (551-479 B.C.), who defined wisdom as "the knowledge that one does not know" (2007, p. 4). The pre-Confucian author (or authors) referred to as Lao-Tzu describes the sage as one who is intuitive, compassionate, and nonmaterialistic. In this framework, obedience to nature is advocated as the path to wisdom (Bates, 1993; Birren & Svensson).

This different approach to understanding wisdom reflects the Eastern predisposition to consider the group rather than the individual as the smallest societal unit of consequence (Cheng, 1998). Put in the context of transformative learning, it would seem that those from the East would be unable to engage in the level of individual self-reflection that Mezirow prescribes. Nevertheless, Eastern thinkers such as Confucius, Siddhartha, and Lao-Tzu, in their ability to provide lasting depictions of the nature of wisdom, must certainly have indulged in some genus of self-reflective and higher order thinking. That members of different cultures might experience transformative learning differently is presented by Taylor (1998) as a critique of Mezirow. Taylor notes that the different ways of knowing that evolve from gender, sexual orientation, class, race, and ethnicity confound Mezirow’s goal to create a universal model of adult learning. I would add that old age might be another context of learning that does not neatly fit the theory of transformative learning.

In order to determine differences and similarities in definitions of wisdom,
Takahashi and Bordia (2000) conducted a multidimensional scaling analysis on four groups of approximately 53 undergraduate students: American, Australian, Japanese and Indian. The results of this analysis confirm that in the contemporary world, the concept of wisdom as understood in the East differs from the understanding in the West. In the West, the words “knowledgeable” and “experienced” are considered to be semantically most similar to the word “wise,” whereas the word “discreet,” followed by the word “aged” are considered to be the least similar. In contrast, the Eastern (Indian and Japanese) students rated “discreet” followed by “aged” to be semantically most closely related to the word “wise.”

In recent years, psychologists have ventured to identify the knowledge, skills, and attitudes that contribute to the development of wisdom. The most notable work in this area has been done at Germany’s Max Planck Institute for Human Development and Education, where an instrument for measuring wisdom is used. The Berlin Wisdom Paradigm uses a set of five criteria to measure the essential pragmatics of life (Staudinger, Dorner, & Mickler, 2005). These criteria are:

1. factual knowledge
2. procedural knowledge
3. lifespan contextualism
4. recognition and management of uncertainty
5. relativism of values and life priorities

One of the central intentions of the Berlin Wisdom Paradigm is to identify the nature of any outstanding cognitive or affective aptitudes that might develop as one
ages. Those studied using this instrument are presented with fictitious life dilemmas, which they are then instructed to consider aloud, through either (a) monologue or (b) dialogue with a partner. The manner in which these dilemmas are approached by the subjects is measured using the aforementioned five criteria. Of pertinence to my study, the Berlin Wisdom Paradigm has discovered that older adults as a general, age-defined group do not naturally possess greater wisdom than do younger adults. However, it has been found that those older adults with sound mental and physical health will demonstrate a wisdom advantage.

Interestingly, those who engage in dialogue to resolve the fictitious life dilemma perform better than those who consider the problem in monologue (Jordan, 2005). Discourse, evidently, is a vital component both in the development of wisdom and in the process of transformative learning. Thinking in terms of older adult education, and specifically of the LRI, the forum for discussion provided in a classroom of older adult students might serve as a laboratory for both perspective transformation and the development of wisdom. If this were indeed the case, however, it would be difficult to demonstrate. As occurs with transformative learning (Taylor, 1998), those who attempt to isolate evidence of wisdom confront the problem of definition.

Any serious review of literature on the subject reveals that wisdom is a multidimensional concept with strong affiliation to what might be described as virtue. Chandler and Holliday (2005) say, "Wisdom has nothing to do with narrow forms of restricted expertise and has everything to do with a broader form of human understanding" (p. 133). Bassett (2005), in describing the connection she sees between
wisdom and transformation, refers to the wise as those who take action on behalf of the common good. Bassett also proposes a multidimensional view of wisdom, depicting it as the compilation of many desirable qualities.

The balance theory of wisdom proposed by Sternberg (1998) involves a mix of both practical and academic intelligence. Sternberg (1990), echoing the findings of a cross-cultural study by Takahashi and Bordia (2000), affirms that the wise are remarkably comfortable with ambiguity. Those who are considered less wise are those who regard ambiguous situations as being distressing yet tolerable, or as intolerable and in need of resolution. Sternberg further proposes that the wise are those who seek solutions that will serve the best interests of the many, rather than the exclusive interests of the few.

Bluck and Glück (2005), in attempting to find convergence in definitions of wisdom across cultures and history, draw a distinction between implicit and explicit theories. Implicit theories capture how wisdom is perceived in general, whereas explicit theories are more formal accounts of how wisdom manifests, who is able to develop wisdom, and quantifiable evidence of its existence. In their review of studies concerning implicit theories of wisdom, the authors arrive at five recurrent themes. These themes represent the most frequently cited aptitudes and characteristics of the wise. They are:

1. intelligence (both fluid and crystallized),
2. insight,
3. a reflective attitude,
4. a concern for others, and
5. real-world problem-solving skills.

Most of these aptitudes and characteristics could certainly be the result of the experience that Mezirow (1978) identifies as a perspective transformation. He describes this as

the process of becoming critically aware of how and why our assumptions have come to constrain the way we perceive, understand, and feel about our world; changing these structures of habitual expectations to make possible a more inclusive, discriminating, and integrative perspective; and finally making choices or otherwise acting on these new understandings. (p. 224)

Missing from Mezirow’s description of this experience, however, are other ways of knowing besides the rational. This shortcoming has been noted in a number of studies. Clark (1992), for example, identifies psychological, convictional, and behavioural changes evolving as the result of perspective transformation. Sveinunggaard (1993) emphasizes the sociocultural aspect and includes the idea of spiritual evolution. Courtenay et al. (1998) identify an increase in compassion. Perspective transformation, then, in addition to sharpening one’s wit, is thought to also aid in the softening of one’s heart. The parallels to the development of wisdom are self-evident, suggesting that perhaps these are both the same phenomenon.

Educational Gerontology

Why does education matter to those who are past the age of retirement? What purpose does it serve, and what is the meaning of late-life learning? Courtenay and
Truluck (1997) believe that meaning making—and perhaps the meaning of life itself—is the answer to all three of the above questions. The crisis of old age, they state, is a crisis of meaning. Those who have retired must find new sources of meaning, especially when employment has previously served this role. In their call for the facilitation of critical thinking as a best practice in older adult learning, Courtenay and Truluck reflect that

the recognition that meaning in life and aging is more about the identification and examination of basic assumptions that underpin individuals’ world views than about the search for an ultimate truth about life refocuses the concept of meaning in life. The new focus acknowledges that individuals, including older adults, make meaning by filtering experiences through their basic assumptions about the world.

(p. 184)

Calling upon the theory of transformative learning, Courtenay and Truluck (1997) indicate that perspective transformation compares favourably to the act of meaning-making in the lives of older adults. That late-life education should be designed to facilitate this type of learning is supported by Moody (1976). Too often, he claims, education for the older adult is designed with no greater objective than maintaining the façade of busyness. Those who design much of the curricula in retirement communities, for example, are perpetuating a type of activity that was familiar to the older adult during his or her working life. Although intentions may be good, the result can be that the learner does not achieve his or her fullest potential in what Erikson (1982, Erikson et al., 1986) would refer to as the eighth stage of psycho-social development. Moody classifies
both leisure education and education that provides skills for a postretirement career as a means of avoiding the fundamental task of old age: the discovery of one’s true self. He purports self-actualization as the ideal goal of late-life education.

A similar conclusion is drawn by Erikson (1982, Erikson et al., 1986). In his epigenetic scheme of psycho-social development, the last stage of life is dominated by a polarity between *integrity* and *despair*. To resolve this conflict of dispositions, the older adult must engage in the type of thinking that Mezirow calls critical self-reflection. In essence, Erikson’s older adult must reconcile his or her past with a growing awareness of death’s approach. In so doing, he or she may achieve what Erikson referred to as the *adaptive strength* of wisdom: a synthesis of detachment, interest, and acceptance of the finality of death.

Thornton (1987) echoes this sentiment. In distinguishing the ideal goals of education throughout the lifespan, he indicates competence and mastery to be the objectives of childhood and adulthood. The learning goal of the older adult, he feels, should ideally be wisdom. He suggests that this may be a natural human proclivity. Drawing upon the work of Havighurst (1972), he reminds us that, until 1930, psycho-social development was understood as belonging exclusively to the period of childhood and adolescence. Late-life adult development had, until then, traditionally been considered a time of declining abilities rather than as a period during which one could experience cognitive and affective gains. It is interesting to note that Havighurst drew upon Erikson’s (1982) stages of ego development to propose the concept of developmental tasks that change throughout the life course. This emerging lifespan
perspective of human development was characterized by Havighurst as an evolving “readiness to learn which at its peak presents a teachable moment” (Knowles, 1980, p. 51).

Missing from these theoretical and, arguably, idealistic views of late-life learning is the voice of those who participate in the learning. The most important perspective on learning for the older adult must certainly come from the older adults themselves. In preparing my literature review, I discovered only a handful of survey-based studies. In Canada, Lemieux and Sauvé (1999) used Rokeach’s Value Survey to fashion a comparative analysis of two groups of 40 older adults. One of these groups was registered in Montreal’s Institut Universitaire du Troisième Âge, while the other was not engaged in formal education. The study concludes that there is no difference in the values of those senior citizens who do and do not attend an LRI. Extrapolating from this, one could surmise that the pursuit of higher education among older adult learners is simply a matter of individual preference. This preference, however, has been demonstrated in other studies to be the result of prior postsecondary education. The level of previous education has been found as one of the most enduring predictors of older adult participation in learning (Manheimer, Snodgrass, & Moskow-Mckenzie, 1995).

In another study, Kim and Merriam (2004) surveyed 189 members of an LRI using Boshier’s Education Participation Scale. The chosen site was an institute in a university town located in the southeastern United States. The results of the survey indicate that cognitive interest is the strongest motivator for learning among this population of older adults. Nevertheless, Kim and Merriam problematize their own
results and suggest that "motives of older adults for learning are complicated and multidimensional" (p. 445). Internal and external forces beyond the scope of the survey instrument are cited as contributors to the decision of the older adult to pursue late-life learning. A more general shortcoming with the survey-based approach to defining motivation is, of course, that the categories have been predetermined by the instrument's developers. Nevertheless, Kim and Merriam's report is valuable in that it provides a summary of similar studies performed using Boshier's scale. Further, it arrives at some interesting recommendations for future research. Among these recommendations is one of special pertinence to my research:

While many quantitative studies have been conducted on older adult education, far fewer qualitative studies have been conducted among this population. Qualitative research can bring a deeper understanding of older adult participation in education and enable future inquiries into the underlying motives of older adults. (p. 453)

Perhaps the most compelling author on the topic of late-life learning has been Moody, who in 1976 examined the philosophical presuppositions surrounding the idea of education during old age. Like Erikson (1982, Erikson et al., 1986), Moody perceives old age to be a stage in life with distinct qualitative demands. Contemporary Western society, however, is depicted as having misplaced the meaning of aging. The culturally symbolic significance of old age, Moody believes, has been lost to the prevailing attitudes of rejection and fear. This carries over into the teaching profession's approach to the older learners. According to Moody, "as educators, we have no clear idea of why older adults
should be educated – and this absence of fundamental philosophical reflection is ultimately dangerous to the whole enterprise” (p. 276). He charges that the notion of lifelong learning receives vacuous general endorsement and endures as little more than a sentimental marketing slogan. As a result, older adult education has simply followed patterns of adult education in general. Yet to be discovered is whether there might be something distinctive about older adulthood that should make our approach to late-life education unique. Taylor (1998) remarks that the educator—one who might be planning to foster transformative learning—must consider the possibility that adult learners of different ages might have very different ways of perceiving. If this is indeed the case, then perspective transformation may be qualitatively unique when experienced by the elderly.

**Summary**

In this chapter, I have indicated what I believe to be the compelling connections found in my readings on transformative learning, the development of wisdom, and educational gerontology. These three areas of interest relate to my research insofar as all have pertinence to older adult learning. Perspective transformation, as a crucial element in transformative learning, has demonstrated similarities to the development of wisdom. In particular, dialogue, critical self-reflection, and a constructivist approach to thinking appear to be elements in both phenomena. Under the thematic heading of Educational Gerontology I have examined the perceived need for meaning-making as a curricular objective for the elderly. Drawing upon the eighth and last stage in Erikson’s epigenetic scheme of psycho-social development, I have highlighted parallels between the crisis of
integrity versus despair and Mezirow's disorienting dilemma in transformative learning. I have further referred to Biblical Wisdom Literature to demonstrate that throughout history the predicament caused by paradox has supplied a medium for optimal self-development.

In the chapter that follows, I discuss how the three themes mentioned above were approached during the collection and interpretation of data. In addition, I provide details regarding my purposive sampling procedure and how the answers to interview questions were analyzed for evidence of patterns of experience.
CHAPTER THREE: METHODOLOGY AND PROCEDURES

Not by years but by disposition is wisdom acquired.


The purpose of this study was to explore the role of wisdom in the experience of retirees who engage in courses in LRIs. In this chapter, I provide details regarding the methodology and procedures I used in my research. My premise at the outset was that the experience of higher education for the older adult learner might be qualitatively distinct. To investigate this, I conducted interviews with 3 men and 4 women enrolled in an LRI in a large city in southern Ontario.

**Research Design**

My objective in conducting this study was to interpret the experience of higher education among older adult learners. A basic or generic approach was employed (Merriam, 1998). I identify this as my strategy in that my goal was to, “discover and understand a phenomenon, a process, or the perspectives and worldviews of the people involved” (p. 11). Interview questions attempted to draw out details from my participants and to identify the connection—if any—to existing theory. As points of departure, I identified theories that I believe are convergent when applied to the sample population: Erikson’s (1982, Erikson et al., 1986) ideas regarding psycho-social development, Mezirow’s (1978, 1991) thoughts on transformative learning, and both Sternberg’s (1998, 2001) and Ardelt’s (2000, 2004) notions regarding wisdom. These theories operated in the background of my questions, lending theoretical structure to a semistructured interview format. An inductive-deductive approach to data analysis was used (Charmaz,
The inductive approach to interview data allowed for analysis of how the participants understood and expressed their experiences. The deductive approach allowed for the use of prior knowledge and theory in the analysis.

Pilot Study

In November of 2006, I completed a pilot study of this proposed research (Farquhar, 2006). Data were collected through a 43-minute interview with 1 participant who roughly fulfilled the same criteria as those ultimately chosen for this study. Although analysis was inductive, I worked with a logically derived hypothesis as my starting point in expectation that there would be "discovery of new relationships, concepts and understanding, rather than verification" (Merriam, 1988, p. 13).

My research participant, Tom (pseudonym) was an older adult student who had attended a series of courses at a local university campus. His participation was part-time, and the courses he took were not related to a vocational objective. I selected Tom for the sake of convenience: I knew him to be an eloquent man who would provide thoughtful answers to my questions. As was my intention, I was able to examine the quality of Tom's answers and use this to revise the interview questions asked in the actual study. In order to code the resulting transcript, I narrowed the margins on the page and allowed space on the right hand side so that I could analyze portions of dialogue and reduce them through line-by-line coding to "chunks of meaning" (Marshall, 1981). I thought it important to reduce Tom's answers in this manner so that patterns might be more easily detected. Further, this practice was intended to contain my impulse to impose my own beliefs on the data.
Keeping in mind my resolve to remain open to unexpected findings, I initially examined Tom's responses for evidence of experiences that could be explained through theory. I began coding by using constructs that evolved from my theoretical framework. Specifically, I looked for discussion of the development of wisdom as defined by Sternberg (1998, 2001) and Ardelt (2000, 2004), incidents of transformative learning (Mezirow, 1978, 1991), and phrases providing evidence of a psycho-social crisis related to a developmental stage (Erikson, 1982, Erikson et al., 1986). Fortuitously, Tom described what I identify as an experience of perspective transformation, which occurred while taking a university course during a period of forced retirement. After exhausting this avenue of analysis, I scrutinized the transcript for patterns and themes. For direction on how to identify these, I referred to Gubrium and Sakar (1994). Themes were derived from the words used to express the views of the informant himself, and patterns derived from my own analysis and frames of reference. As a result of this examination, I noted that Tom discussed at length specific aspects of personality development that he believed were linked to his pursuit of higher education. This provided me with tentative themes to which I was alert during my research at the LRI.

Overall, the pilot study was highly instructive. It assured me that a larger research project would provide rich, ample data for analysis. Moreover, based on the pilot, I concluded that my study could make a useful contribution to future students of adult education.

Site and Participant Selection

The University of the Third Age (U3A) is an international organization that began
in 1973 at the University of Social Sciences in Toulouse, France. It was conceived with the vision of ensuring lifelong education for retired members of the community, those men and women who had entered the so-called third age of life. The raison d'être for this educational movement was the conviction that retired men and women possess a lifetime of experience and hence a wealth of knowledge to share.

Since the inception of U3A, other institutes for learning in retirement have evolved worldwide. They most often take after either the French or British model (Swindell & Thompson, 1995). The French model is university based, whereas the British model emphasizes informal learning at a variety of locations. In Canada and the U.S., the term U3A is not in popular currency, but the tradition exists in what are known as Learning in Retirement Institutes (LRIs). For the purposes of this study, I focused on one LRI that adheres to the French model. This caused me to exclude Elderhostel, a worldwide nonprofit travel and learning organization that caters to those 55 and over. I feel that I must remark upon this decision, as Elderhostel is a popular and widely recognized learning organization. Combining education with travel, Elderhostel is unique unto itself in that it offers experiential learning, noncredit classes, and lodgings around the world for older adults. Unlike Elderhostel, the university based LRIs are most often classroom rather than field based. Although the courses offered through an LRI are, as is the case with Elderhostel, noncredit, they are far more affordable than those that require the learner to travel. Because of this, price is not as significant a barrier to participation. By excluding Elderhostel from consideration in this study, I improved my likelihood of finding respondents from a variety of socioeconomic backgrounds. Further, while it is
true that Elderhostel courses are individually rated by the anticipated activity level, a glance through a program catalogue (Elderhostel, 2007) indicates that physical disabilities would preclude participation in many of the courses, which involve travel over a variety of terrains. Therefore, the exclusion from Elderhostel of those on limited incomes and those with limited mobility predisposed me to concentrate on a classroom-based LRI.

The curricula at the LRI where I conducted my study are determined by the organization members, who are usually also students at the institute. Unless professors volunteer or agree to lead classes for a modest fee, individual students will take responsibility for designing and moderating classes. These classes are held both during the day and in the evenings. There are no programs of study per se at this LRI, but rather half-term courses from which students can freely choose. However, these courses are not part of the regular university curricula and cannot be used as credit toward a diploma or degree. This leads me to my final rationale for choosing an LRI as a site for study: the implicit motivations of the students. I believe that those who attend an LRI are dissimilar from older adult students who participate in credit courses when a degree or diploma is the goal. Those who attend courses at an LRI will not be rewarded with the acknowledgement one receives when obtaining a mark and/or accreditation. As a result, the ego gratification that accompanies receiving formal recognition for course and program completion is not available to LRI students. To my mind, this indicates that they are a unique group to be studied apart from other older adult learners.

In selecting a research site, I identified two LRIs within a reasonable distance of
my home in southern Ontario and three others that would require significant travel within the province. When ethics clearance was received from Brock, I approached the program manager of the LRI closest to my home and asked for assistance with my study. My intention, had assistance been denied here, was that I would then approach the LRI second closest to my home, followed by the LRI next closest to my home, and so on until one granted me access. Happily, the program manager of the LRI closest to my home granted me permission to interview members of the institute and in fact aided me in reaching them immediately through the institute’s electronic newsletter. As a result, my Call for Participants (see Appendix A) was broadcast to a pool of older adult learners who had been recently or were currently involved in liberal arts courses. I make note of the fact that these were not courses on math or science, not because I chose to exclude these disciplines but rather because they were not offered.

**Recruitment Procedures**

Key informants were sought through purposive sampling. Drawing upon Patton’s (1990) table of purposive sampling strategies, I identified my plan to use a conceptual rationale, in that my chosen participants had to satisfy selection criteria.

Between 6 and 8 older adult students from an LRI program were sought to participate in semistructured interviews. Selection was purposive (Patton, 1990), as those interviewed first needed to demonstrate that they fit the following criteria:

1. Each participant was to be at least 55 years of age.
2. It was necessary that each participant should be attending or had attended an LRI program full- or part-time since entering into semi or full retirement from the
workforce.

3. Each participant was to have completed a minimum of two courses.

4. Each participant would need to have completed courses that were academic in nature. Ideally, the courses completed should have allowed the student the opportunity to engage in higher order thinking through the vehicle of discourse. This requirement evolved from my desire to interview learners whose motivation for taking a course included the need for cognitive stimulation and challenge.

My Call for Participants (see Appendix A) invited those who fulfilled the above noted criteria to contact me either through my e-mail address or telephone number. To my delight, I began hearing from respondents within 24 hours. An Eligibility Survey (see Appendix B) was emailed to each. Although respondents were also offered the option of responding by phone to the Eligibility Survey, all were comfortable with electronic mail as the means of communication. Ultimately, 12 interested men and women contacted me.

Of these 12 respondents, 1 was immediately discounted as she did not adhere to my criteria. A thank you letter was sent. Of the remaining 11 interested men and women, I received Eligibility Surveys back from 8: 3 men and 5 women. At this point, I mailed each a Letter of Invitation describing the study and asking the respondent to contact me to establish a time and place for an interview.

The 7 who remained interested were invited to meet with me individually at a time and place of their choosing. Before each interview, I read aloud the Informed Consent and answered any questions. Each participant signed this consent before we proceeded with the interview.
In designing my study, I had anticipated that I might receive a flood of responses beyond the number of participants actually required. In preparation for this, I had designed a Participation Eligibility Key (Appendix C). In the case that I identified more participants than required, the following selection protocol was to be observed:

1. Those respondents who were fully retired would be favoured over those who were only semiretired. This was implemented to better ensure that my participants had entered into late-life learning for reasons unrelated to vocational goals.

2. Those respondents who had taken the highest number of courses or who had attended school for the highest number of years would be favoured over those more recently involved in adult education and over those having completed only a few courses. This would better ensure that my participants had a strong demonstrated commitment to lifelong learning.

3. The respondents who had begun their studies latest in life would be favoured. This was based on my assumption that the older the learner, the more likely learning had been unrelated to a vocational goal.

4. Regardless of these earlier factors, men would be favoured over women until three or more male participants had been found. This protocol would be observed in anticipation that there would be more female than male respondents. I based this on both demographic information regarding longevity (Statistics Canada, 2005) and indications that women are more likely than men to participate in adult education (Merriam & Caffarella, 1991)

5. If there were to remain an excessive number of qualified respondents after these
aforementioned criteria had been applied to the potential participant base, then selection would have been made strictly on the basis of convenience as regards each individual’s proximity to my home and his or her availability to be interviewed around my work schedule.

As it evolved, these criteria were found in my participant sample. All of my participants were fully retired, and all but 2 (Jean and Gloria) had begun their studies after retirement. Three of the 7 participants were male. One of these men (Leo) had been involved in adult education for approximately six years, which made him the most inexperienced of all my LRI participants.

**Data Collection**

I interviewed participants separately at locations of their choice. Each interview was audiotaped. The questions were semistructured and open-ended (Appendix D: Interview Questions). All but two of the initial interviews lasted less than 1 hour. Some of the responses required further probing, which was a realization I came to only after transcription was complete. In order to obtain the level of detail desired, I returned for a second visit and spoke with 4 of the 7 participants for approximately 10 minutes each. The other 3 participants were not available for one-on-one contact, so I relied upon both e-mail and electronic messaging for clarification of certain questions.

Each interview was audio recorded on micro-tape cassettes. I transcribed these tapes myself. When transcription was complete, I sent to each participant a copy of his or her interview for the purpose of member checking. Member validation occurred individually, as each participant received a copy and attested to the accuracy of his or her
transcribed interview. A timeline of 2 weeks was given to each member to respond with any requested changes. All were informed that, if requested, I would alter or dispose of his or her transcript before using it for data analysis. When I had consulted all participants in this manner, collection of the data was deemed complete.

**Instruments**

The primary data of the study were derived from individual interviews. In the process of collecting data, I used Interview Questions (Appendix D) and a research journal as my instruments.

*Interview Questions*

I asked 14 open-ended questions in a semistructured interview format. Although it was my intention to minimize interviewer effects by asking the same sequence of questions with each participant, the semistructured format allowed for digressions and to some extent allowed the conversation to flow naturally (Patton, 1987). It was my intention that this interview format would allow me to gather the greatest amount of data possible in the short time allowed for my study. The first 4 questions were intended to put the participant at ease by gathering some information regarding his or her current life circumstances. Using Patton’s (2002) description of question types, I identify that this first line of inquiry belongs to the *background and demographics* category. The next question, number 5, inquired whether the participant could recall any memorable or remarkable situations in his or her life that preceded the decision to return to school. The sixth question attempted to discern if there had been what Brookfield (1995) referred to as a *critical incident* during the participant’s late life studies. A critical incident would be
an occurrence that held special importance for the learner. Generally, the occurrence would be considered significant because it provided access to a new outlook or insight. Question 7 attempted to discern if there had been critical incidents in the participant’s experiential learning. By asking the respondent to consider learning outside the classroom, I tried to jar memories that might speak to the development of wisdom. Once again referring to Patton’s (2002) description of question types, this set of three would fall into the *experience/behaviour* category. Question 9, which asked the participant to identify and describe a time when wisdom began to develop in his or her life, also belongs to this category.

Questions 13 and 14 were intended to glean the thoughts of participants concerning involvement with an LRI. These questions invited elaboration on both motivations and on the practical implications associated with LRI participation. Adhering to Patton’s (2002) categorization, these four questions belong to the grouping he refers to as *opinion/values*.

Questions 8 and 10 were designed to elicit ideas regarding the attributes that contribute to a state of wisdom. These were similar to questions 11 and 12. With these latter two, I asked that the participant imagine him or herself in the future. Working from the assumption that their overall health will be fine, the participants described two states of being: their ideal elder selves and their less than ideal elder selves. The intention of these questions was to make the participant consider the characteristics of those who have and have not successfully negotiated the psycho-social developmental tasks of late life. I expected that these questions would cause the respondents to speak from critical
perspectives about their own implicit motivations for late-life learning. Referring again to Patton's (2002) categorization of questions, this set solicited not only information on opinions and values, but also information on *feelings*. Beyond this, questions 11 and 12 asked that the participants should muse upon the future and provide information based on conjecture. Patton cautions against this type of questioning in that the answers do not generally produce thick description. Nevertheless, I felt that these questions would provide me with an excellent insight, no matter how succinct, of what the participants held to be essential cognitive and affective attributes at the end of life. In fact, these questions yielded information that I found most helpful in discerning the meanings of wisdom held by my respondents.

At the conclusion of each interview, the participant was asked if he or she had any concluding remarks. Soon after, the interview ended and the audiotape recorder was switched off.

*Research Journal*

As an instrument, my research journal was used for several purposes. Foremost, I used it for writing notes during recorded interviews. Beyond the fact that the act of writing notes served as a safeguard against lost information in the event of an audio-recorder failure, the keeping of notes also allowed me to record my observations. Notes taken from meetings with my thesis supervisor and advisement committee members were also kept in this journal, under a section so titled, accompanied by corresponding dates.

*Data Analysis*

The stages of analysis that I followed are listed below.
1. In the interest of protecting the participants, the interviews were transcribed using pseudonyms for the study participants. Participants were made aware of this intention at the time of interview, and each was given the opportunity to choose his or her own pseudonym. When a participant declined this opportunity, I chose the pseudonym myself.

2. The transcribed interviews were given wide margins on both the right and left sides in order to allow for coding (Charmaz, 2000). The left margin was used for codes that I assigned to my predetermined themes of interest that had emerged from my initial literature review. The right margin was used for codes that were emergent with transcript analysis. To gain a sense of how codes were developed, see Appendix E.

3. Steps 3a, b, and c occurred simultaneously. Nevertheless, each is described separately because each involved a unique approach to data collection.

   a) I looked for constructs that would bring order to my descriptive data, understanding a construct to be “a concept that is inferred from observed phenomena and that is assumed to underlie those phenomena” (Gall, Gall & Borg, 2005, p. 291).

   b) I searched for themes, which Gall, Gall, and Borg (2005) describe as recurring and salient features that present themselves in a case study. Emergent themes were sought within both individual and multiple cases. The identification of a cross-case theme or themes was defined to be highly significant.
c) I searched for patterns. According to Gall, Gall, and Borg (2005), patterns can signify relationships among phenomena. Found within one case, patterns were noted. Found across many cases, patterns were considered important findings.

4. Step 3 involved multiple readings of transcripts and much note-taking upon the right hand margins. Coding developed as the result of this process. Both inductive and deductive analysis came into play (Miles & Huberman, 1984). Working deductively, I sought evidence of transformative learning, the growth of wisdom, and late-life learning. Working inductively, I sought patterns and themes that helped me interpret the phenomenon under study.

5. As noted under Ethical Considerations (see below), I conducted such member checking as was possible in order to ensure the authenticity and trustworthiness of my data.

Both the emic and etic perspectives (Schwandt, 1994) were considered in the analysis of data. The emic perspective, deriving from the participant point of view, was sought through member checking, and also by paying close attention to the language used by participants. Attending to the emic perspective prevented me from simply imposing my own interpretation upon the lived experience and meaning perspectives of the learners. Once I had scrutinized all responses, explanation developed from the etic perspective. In the etic view, I developed conceptual theoretical explanations of my findings. In order to establish the credibility of my results, I sought and referred to other
studies that corroborated my findings. A strong chain of evidence was produced through an audit trail of my research.

In order to achieve trustworthiness, I remained open to and recorded negative cases. I also provided an audit trail and conducted member checks. These strategies to ensure validity were suggested by Lincoln and Guba (1985). Their suggestion that the researcher should have a prolonged engagement with the participants was not possible given the time restrictions for completion of this research. I see this as a limitation. Another limitation evolves from the fact that there was only one researcher, only one site of research and only 7 participants. Greater numbers in all three areas would have provided a greater variety of responses and a richer interpretation of the data.

It is not expected that the results of my research are generalizable outside of the group that it represents. However, some patterns representative of how older adults with similar backgrounds think and make decisions related to lifelong learning may be extrapolated from my findings. Unexpected insights evolving from my inductive analysis of the data gleaned from this group inspired suggestions for further avenues of study. I will remark upon these in Chapter Five.

Methodological Assumptions

By speaking with older adult students of LRIs I was able to elicit descriptive information regarding perspective transformation and the development of wisdom among late-life learners. It was my conviction that their voices were the most valid instruments to use in the search for points of connection in theory. Wiessner and Mezirow (2000) attest that many aspects of Transformation Theory are not suitable to quantitative
approaches to research. Working with this assumption, I expected that semistructured interviews with open-ended questions would elicit the most useful data for my purposes.

I worked from the assumption that older adult students pursuing higher education would accept the existence of wisdom and that they would be articulate enough to define and describe their various perceptions of this phenomenon. Further, I presumed that there is merit to the theory of developmental stages as described by Erikson (1982) and transformative learning as described by Mezirow (1991). Moreover, in proposing this study, I assumed that the learning experience of the older adult enrolled in higher education was a matter that merited attention. The need to examine this experience provided the impetus for my investigation.

Ethical Considerations

As an educator of adults and as a middle-aged student, I continue to be intrigued by the topic of internal motivators for an older adult’s late-life learning. My bias is that the drive to develop wisdom may be a common feature of late-life psycho-social development. This working hypothesis has inspired my research and will certainly be evident in my interpretation of interviews. Nevertheless, by attending to this bias and remaining open to emergent themes, I was able to identify new avenues of exploration when transcript analyses were performed. In order to keep my bias in check, I maintained a research journal during my research.

As regards protecting the research participants from harm, I followed ethics procedures as outlined below.

1. In collecting the Eligibility Surveys, I assigned each prospective participant a
Survey Participant Number that corresponded to his or her contact information. I kept this contact information under lock and key in a filing cabinet in my home.

2. I e-mailed as a Microsoft Word attachment an electronic copy of the Letter of Invitation to each participant. On the day of the interview, I asked each participant to sign an Informed Consent, which I had printed beforehand. All agreed.

3. As mentioned under Data Analysis, a pseudonym was used in place of the name of each participant, and any personal identifiers were not reflected on the data gathered either through the interview transcripts or other written observations. I took pains not to mention the actual names of the research participants during the taped interviews. In all print matter associated with the study, actual names were not used. The only exception to this was with the personalized Informed Consent forms. Direct quotes were scrutinized to ensure that no identifiers could be linked with the participant in the research study.

4. At the outset of each interview, I reiterated the purpose of the research and the level of confidentiality the participant could expect. At that time, and before proceeding with the interview, I indicated a willingness to address any issues or concerns identified by participants.

5. The interview questions and subject matter were not expected to prompt psychological distress among my research participants. Nevertheless, each participant was advised in the Informed Consent and before the interview that he or she was free to withdraw from participation at any point before final submission of the thesis.
6. In order to establish the credibility and trustworthiness of my interview results, I requested member checking (Lincoln & Guba, 1985). To this end, each willing participant received through e-mail or regular mail a copy of his or her transcribed interview for review and validation.

7. The original audiotapes were kept in a locked file cabinet in my home office except during the act of audio transcription.

8. The data, audiotapes, transcriptions, field notes, observations, and analyses of the interviews were kept in my possession and shared only with my advisor.

9. These same artefacts were destroyed immediately after defence of my thesis. The written material was shredded. The audiotapes were erased and then discarded.

Dissemination

The results of my research should be interesting enough to warrant dissemination through a graduate conference. In addition, I plan to query the journal *Educational Gerontology* with the proposal that I submit an article based on my research results. Other journals might also be approached. These plans for dissemination were included in my Informed Consent to research participants.

Summary and Restatement of the Purpose

My intention was to conduct between six and eight interviews with semi- or fully retired men and women over age 55, all of whom had completed some or all intended coursework in an LRI program. Ultimately, 7 older adult learners at an average age of 77 were my informants. All had successfully completed some or all of their intended coursework at one Learning in Retirement Institute (LRI) in southern Ontario.
I conducted a series of interviews in order that I might interpret patterns and produce an inductive and deductive data analysis. My intention was to gather information that might explain how the participants understood themselves as learners. My purpose was to explore the role of wisdom in the experience of older adults who pursue education in an LRI. For theoretical guidance, I referred to Erikson (1982, Erikson et al., 1986), Mezirow (1978, 1991), Ardelt (2000, 2004), Sternberg (1998, 2001), Moody (1976, 1986), and Thornton (1987, 2003).

I have sought contextual completeness in my research through much editing of the final transcript. At the conclusion of my report, I have made every effort to provide useful recommendations that can be applied by others who share my interest in this area. It is possible that avenues for exploration and theory building will evolve from my research. Should this fail to transpire, I will at least have identified a line of questioning that could be abandoned or refined before future pursuit.
CHAPTER FOUR: FINDINGS

I consider the old who have gone before us along a road which we must all travel in our turn. And it is good we should ask them of the nature of that road.

(Attributed to Socrates: Plato, 427–347 B.C., The Republic)

In devising my research, I took a hint from Plato. It seemed like a good idea to ask the old—in this case, older-learners—to describe the nature of the roads that they had travelled. I began with the premise that wisdom might be considered the outcome of late-life education and that transformative learning might serve as the process. In order to explore this notion, I interviewed 7 older adults who had been or currently were enrolled in a Learning in Retirement Institute. Patterns of experience and commonalities of participant interpretation were sought through interpretation of data. When these were established, I compared them against themes that were evident in my existing theoretical base. Specifically, I sought patterns in the experience and attitudes of the respondents toward late-life learning, and evidence of perspective transformation. Further, I sought their definitions of wisdom and anecdotal evidence of its acquisition. From this, I arrived at the following themes, which will appear as headings throughout this chapter. They are (a) motivations for attending an LRI (b) disorienting dilemmas (c) critical reflection (d) meaning perspectives, and (e) wisdom.

Subsequent to the above, I examined unexpected findings for patterns, which I grouped into themes. These also appear as headings throughout this chapter. They are (a) self-directed learning (b) gender based differences in late-life learning, (c) interrupted narratives, and (d) resisted perspective transformation.
Key Biographical Information

In this section, I will provide biographical information regarding my informants. Although all were generous in supplying anecdotes and information regarding their lives, I include only those details deemed to be of special value to the study at hand. In order to protect identities, I have not only altered the names of my informants but have also changed details that might make identification of these men and women possible.

Each of those who participated in this study had attended or was continuing to attend the same Learning in Retirement Institute at a university in a city in southern Ontario, Canada. Three of my informants were male, and 4 were female. Two were immigrants, and all were White. The average age of these men and women was 77. The eldest was 83, and the youngest two were both 71.

Of my 7 respondents, 5 arrived at the LRI with a history of lifelong learning. Five had formal postsecondary education. One of the 2 respondents who had not attended college or university had supplemented her education with many courses, both through her workplace and through various community centres. This overall high participation in education after high school among my respondents reflects the findings of other studies that a history of previous educational involvement is the best predictor of late-life participation in formal and informal education (Kim & Merriam, 2004; Manheimer et al., 1995; Merriam & Caffarella, 1991; Valentine, 1997).

Of key interest is the finding that the 2 respondents who had not attended school for approximately 55 years—Leo and Alan—also reported profound personal changes as the result of involvement at the LRI. That they were so deeply affected provides support
for the proposal that a return to school after a long absence can cause a disorienting dilemma, which in turn can serve as a catalyst for perspective transformation (Mezirow, 1978, 1991). It should be noted, however, that both of these respondents went beyond mere participation as students but also became involved as moderators. I believe that this is an important distinction.

Each of the respondents generously agreed to meet with me in his or her residence. By gaining access to these homes, I was able to observe telling evidence of socioeconomic status. I was also able to gain a sense of preferences, interests, and what Erikson et al. (1986) referred to as one’s level of vital involvement in old age. Erikson and his colleagues found that this in situ observation enhanced understanding when conducting interviews with the elderly. “The arrangement of the spaces in which our people live is in many ways as much an indication of their involvement as any verbal statement they made in the course of our interviews” (p. 27). Attending to this insight, I have noted details concerning décor, location, and type of home that I feel might enhance the reader’s appreciation and understanding of those men and women described below.

**Bluma**

An elegant woman of 82, Bluma was found to be residing in the heart of the city in a desirably situated and beautifully appointed condominium. This environment, however, represented a recent change in her living circumstances. Approximately 18 months before we met, Bluma had agreed to leave her home city of 80 years in order to live with a male friend. This new romance was clearly a source of delight. Having had many other relationships in her life end badly—through a variety of circumstances,
including death, divorce, and forced separations—Bluma was understandably pleased with
the recent acquisition of a doting lover. Attending to her recounted life history, I
construed that intellectual freedom and a great deal of heartache had been defining
features. Bluma struck me as being somewhat of a femme fatale. By her own account, she
had a long history of complicated romantic involvements. Her charm, self-reliance and
aura of mystery had—and apparently continued to have—a spellbinding effect upon men.

Of all my respondents, Bluma’s education was the greatest in terms of quantity of
degrees. She held a variety of undergraduate and postgraduate degrees and had in fact
never truly stopped attending school. Before retirement, this ongoing education had
permitted Bluma to make valuable and lasting contributions in her field. Involvement
with an LRI at a Canadian university had begun upon her retirement and in her home
city. At the time of our interview, it was continuing in her new city of residence at a
different university.

Beyond her involvement with the LRI, Bluma maintained a staggering schedule
of social, cultural, and educative activities. Music (both as a patron and as a student),
theatre, folk dance lessons, and LRI participation comprised much of her routine. As
regards her upbringing, Bluma was raised in what she described as an upper middle class
home. Her father was a highly successful professional, albeit a self-made man from a
family of poor Jewish immigrants.

*Alan*

Alan described his life before retirement as being typical of a wealthy
professional who entered adulthood in the 1950s. His children were raised by their
homemaker-mother; his sense of self-worth was primarily derived from his accomplishments on the job. With specialized accreditation from university, he rose in his chosen field and became a recognized expert in one novel area of practice. His success lingered as a source of satisfaction. Beyond this, he was evidently proud of his approach to retirement, which he had anticipated would be difficult unless carried out systematically. As a result, he took a graduated retirement that saw his days of work reduced incrementally over a 2 year period. Hence, when full retirement arrived, he was already accustomed to the free time. It was after retirement, and upon the invitation of a close friend, that he became involved with the LRI. At the time, he did not anticipate that late-life education would provide anything more than a diversion. This proved not to be the case. In fact, Alan quickly became so involved with the institute that he began moderating courses. One of these courses—a seminar series concerning morality and ethics—caused him to rethink many of the taken-for-granted assumptions he had carried throughout his entire adult life.

At the time of our interview, Alan was 76 years of age. He was generous with his time despite his busy schedule of moderating courses and performing administrative duties at the institute. Married and a lifelong resident of the same city, he described himself as a self-made man. Raised in a Jewish working-class environment, he marvelled at the number of his childhood friends who became professionals. His house, which was impressive, suggested that he had overcome the economic challenges of his youth and had achieved a good measure of financial success.
Jean

As a young woman, Jean had received an undergraduate degree from a prominent American university. She moved to Canada in her late 20s with her husband. As was the middle-class custom in the 1950s, she left her career in order to raise children. Although she described herself as largely nonreligious, at the time of our interview she nevertheless retained ties to a Christian church where she enjoyed discussion and reflection on the social gospel. At age 83, Jean was the eldest participant in the study.

From the living room window in her midtown condominium, Jean enjoyed a wide vista of the downtown core and a birds-eye view of a rolling graveyard, situated directly behind her building. When we met, she had been recently widowed. Her manner was gracious yet subdued. Speaking quietly and without much elaboration, she described her continuing education, which began when her children were young adults. At that time, she began working toward accreditation in criminology at the local university. Although she was recognized as the top student in her first year, she did not reenrol and abandoned this course of study. The reasons for failing to continue this program to completion could not be recalled. Nevertheless, Jean described the experience of studying criminology as being significant in that it caused her to rethink the meaning of policing.

Jean’s involvement in the LRI began after her husband’s retirement but has been complemented by a variety of other studies, generally offered by one of the local universities. She made reference to a preference for courses that involve discussion and which attract a core group of students on a regular basis. When there are fewer than three students, she bemoaned, the quality of the discussions lessen. An avid reader of history
and current events, with a particular interest in foreign policy, Jean said that “the opportunity to exchange ideas on a serious subject” had been her primary motivation for enrolling in LRI courses over the years.

Leo

At age 76, Leo was an energetic, expressive, and surprisingly emotional man who clearly enjoyed the opportunity to share anecdotes concerning his journey through retirement. A lifetime resident of the same city, he had been married to a woman who served as his partner in a retail and service-based business for many years. Summarizing his young and middle adulthood, Leo stated: “I never finished school. That’s another story. But I’m nobody’s fool. I would have been a poor professor, so instead I became a rich business man.”

Leo was raised in a Jewish working-class environment and did not complete high school because of what he described as a “learning difficulty.” Nevertheless, he credited his financial success to his natural ability as a salesman and his “very high IQ.” At the time of our interview, he resided in a house located in a desirable residential neighbourhood with close access to the city core. Distinguishing his home from others on the tree-lined street, however, was an unconventional sculpture on the front lawn. It served as a better means of locating his house than the actual street number. As Leo had told me on the telephone, “You can’t miss it.” He was right. I thought it a fitting herald to my meeting with Leo, who himself was quite an original.

My interview with Leo was lengthy and wide ranging. A natural story-teller, he entertained me with reenactments of key episodes in his life. His flair for drama was
evident. It was not surprising to learn that he had built a career as a professional speaker since retiring from business. This new occupation, which evolved from involvement in the LRI, had apparently been of great consequence to his sense of self-worth. According to Leo, retirement was a sudden occurrence triggered by the sale of his business. Unlike the gradual transition described by Alan, Leo entered this new stage of life without preparation and with no gradual relinquishment of work responsibilities. Leo described the time after he sold his business as an emotionally difficult period during which he struggled to establish his identity as a retiree.

Leo’s return to school—specifically, to the LRI—played a pivotal role helping him to find meaning and purpose in retirement. It was at the LRI that he acknowledged his love of history, which he soon parlayed into his role as a course moderator.

Thompson

Having worked as a writer for much of his adult life, Thompson described his relationship with the LRI in opportunistic terms. Although he had taken courses and had even moderated one, at the time of our interview he had chosen to retain his membership simply in order to access the university library. This rejection of formal classroom settings had been a pattern throughout his life. Since early adulthood, he had entered various universities without completing the degree requirements of any. His busy agenda as an author and editor accounted for much of his apparent truancy. Moreover, he expressed dismay with the professors he had encountered over the years. In his estimation, only a small handful were worthy of their posts.

At 71, Thompson conveyed contradictory views regarding retirement. Although
he claimed to be financially secure and able to enjoy a life of leisure, he also articulated a
desire to edge his way back into the life of a freelance writer. When we met, he was
making his home in a government housing co-op within walking distance of the inner-
city LRI. Throughout the apartment was evidence of much reading, research, and
ongoing writing. Were it not for the kitchen and bedroom, his home could easily have
been mistaken for an office in a newsroom.

Lisa

A widow for 18 years, Lisa was interviewed in her home at a midtown
government housing co-op. Her apartment was small, yet colourful and eclectic in décor.
Children and grandchildren resided elsewhere within the same city. Trained in a medical
specialty overseas, she came to Canada in the 1960s when work for immigrant
professionals was plentiful. She did not leave her career until the care of her gravely ill
husband became focal to her life. She recalled having become involved with the LRI
approximately 3 or 4 years after his death. Almost simultaneously, she founded a small,
nonprofit agency to provide meals to urban children living in poverty. Involvement with a
host of other social welfare organizations had also consumed her time during this period.

At age 71, Lisa had spent 14 years as a part-time student and nearly a decade as a
moderator of courses at the LRI. Her area of interest had been sociopolitical issues.
Although also active in the administration of the institute, she indicated that the year of
our interview would likely be her last at the LRI. She was planning to leave for studies at
another local academy where greater opportunities for discourse might be found.
*Gloria*

Of all the participants interviewed, Gloria was the only one residing in the suburbs. Her small, tidy home was on a street close to a major intersection. Widowed shortly before the birth of her second child, she had returned to the workforce as a single mother. The financial strain was great. Gloria was forced to abandon her hobby of traveling, which she had begun to satisfy years earlier. Reluctantly, she accepted what she found to be a dull job in a prosperous corporation. The selling point of this position was that it offered a pension plan. She worked as a secretary with special expertise in booking travel. Over time, the earnings from this job provided her with financial security.

Throughout the years when Gloria was dragging herself to the job that she despised, she sated her appetite for learning by attending courses, for both professional and personal development. By her own description, she loved learning and constantly yearned to be attending school and traveling the globe. Upon retirement, she was able to realize both of these dreams. In her words, “I’d drive out in the morning, and the whole way, driving to work, I’d be thinking, ‘I’d rather be doing this, or doing that, or taking this course, or that course.’ So, once I retired, oh my! I felt as if I’d been let out of prison!”

At age 79, Gloria was particularly proud of the memoirs that she had written, published, and was continuing to author in the genre of a travelogue. Learning to write an autobiography was a skill that she developed at the LRI. At the time of our interview, she continued to pen her ongoing life story, which at that point included visits to 75 countries. In addition, she had written the biographies of her parents and genealogical
books for six families connected to her own ancestry.

**Motivation for Attending an LRI**

Of great interest to me was what the respondents failed to say. When I devised the interview questions, it seemed likely to me that many would indicate school attendance was motivated by a desire to keep their minds young. However, only one of my respondents made this attestation. This might suggest that reverence for youth is subsiding as a feature of Western culture and that we are becoming an age-irrelevant society, as is posited by Manheimer (2005). In fact, 6 of my respondents had highly unflattering memories of themselves as young adults. Gloria, for example, referred to herself as being "clueless" as a young woman. Bluma admitted that she was "immature" and a "wimp" when she first married and that she found it painful to think of her behaviour in those days. Alan recalled himself as being shy and credulous, lacking confidence. Jean described herself as having "a very simplistic view" of life and of not being "a deep thinker." She summarized her youth by saying, "I had the feeling that no challenge was too great for me, and that possibly the worst cross I had to bear in life was that I didn’t like my nose."

Another pattern that I erroneously expected to arise from responses relates to the intangible motivators for late-life learning. At the outset of my research, it seemed likely to me that participants would allude to their education as a meaning-making exercise associated with old age (Moody, 1986). I find it significant that only 3 of my respondents—all of them course moderators—made reference to acquiring information that might aid understanding and enhance the latter part of life. In fact, the significance of
late-life education as a meaning-making exercise was often downplayed. The intellectual stimulation that the respondents discussed was portrayed as a pleasant and largely passive diversion, which I have labelled *edutainment*.

Bluma spoke of her postretirement education simply as part of her program of making “a happy life” for herself and indicated that the courses she had taken were “recreational.” Jean referred to the LRI as an intellectual and emotional tonic to counteract the effects of living in the information age. In her words, “If I just read these books about Iraq and it’s all bottled up in here, I’m not sure it does much good to anybody.” Regarding the course content, Alan referred to the liberal arts program at the LRI as “pap” that “didn’t work for me.” Nevertheless, he acknowledged that developing and moderating a course on ethics had been extremely useful in helping him to scrutinize his long-held assumptions. Lisa, another class moderator with years of experience, held a similar view. By serving as a course moderator, she had been placed in a role where she needed to critically examine her own views and restrain herself from judging those of others. In her words, “I’ve learned to listen to that other person and not to reject it out of hand. That’s been so important to me. As a person. The listening as a moderator. That’s been quite valuable.”

The fact that there are no student evaluations, diplomas, or degrees offered through LRI courses seems to have caused some respondents to trivialize the value of the education received therein. Bluma, Thompson, Jean, and Gloria rejected the notion that their education was significant beyond its role as a stimulant. For example, Gloria spoke of herself as a dilettante at learning. In her words, “I’m not a student, per se.” This
contradicted evidence of the considerable learning that had taken place: the books that she had authored, self-published, and sold since taking an LRI course in memoir-writing. These books, however, likely held significance for Gloria on a level which she was unable to fully articulate. I identify Gloria’s writing of memoirs as evidence of the adaptive strength of integrity found in Erikson’s (1982) epigenetic life scheme. In the eighth stage of psycho-social development, the older adult can protect against despair by ensuring his or her grand-generative function. This task involves remaining vitally involved in life by helping to cultivate the next generation. Responding to a question regarding her idealized self in old age, Gloria said,

Oh yeah, it’s a very positive outlook that I have. And I just want to be here for my family, still able to help them financially or otherwise. My granddaughter is turning 14, and she has become interested in my life. She’s asking me lots of questions and stuff. I haven’t given her the books yet, because I don’t think she’s ready for it yet. I just hope that she will come to me, because she’s starting to now, and asking me questions.

Intellectual Stimulation

Kim and Merriam’s (2004) survey of 189 members of an LRI, which made use of Boshier’s Education Participation Scale (1971), found that pure cognitive interest was the strongest motivator for late-life learning. Closely reflecting this finding, my participants indicated that the desire for intellectual stimulation was the strongest motivator for learning. This was referred to variously. Bluma stated, “I need intellectual stimulation. I crave it.” Gloria, the world traveler, recalled, “When I retired, you know, I was hungry
for knowledge.” Leo closely echoed these words and described himself as being “hungry to learn, hungry to read, hungry to travel, hungry to meet people.” When she stopped working, Lisa recalled that she joined the LRI because “it just sounded like a place that was stimulating.” Thompson, who retired at 60, did so in order to write and “develop my own ideas. And that’s basically when I began to think.” It was his hope that the LRI would be a place where he could engage in discussion and get feedback on his ideas regarding politics and society.

Kim and Merriam’s (2004) survey showed that social contact was the second most important motivator for learning among older adults. This finding is consistent with data from other similar studies (Bynum & Seaman, 1993; Garofolo, 1995). My participants, in discussing their experiences at the LRI, indicated their interest in meeting others was not with the goal of light social interaction such as one might find in many community-based clubs for senior citizens. The interaction my participants craved was of an intellectual nature. Discourse on topics such as current affairs, ethics, history, and literature was mentioned as the primary reason for attending the LRI. One of my respondents was quite frank: Her friends were not interested in this type of conversation, and her daughter wanted only to talk about shopping. As a result, this respondent sought stimulating discussion through the LRI and other discussion groups within the city.

Four of my respondents expressed impatience with some of the other students at the LRI, especially those who were highly opinionated, vocal, and prejudiced. Lisa referred to the intolerant attitudes of some of her classmates. She said, “I have certain issues which I find very difficult not to react to—when I hear people slamming everyone
on welfare, and so on. And doing a blanket statement about people on the street, and this sort of thing.” Both Leo and Thompson spoke of losing patience with what they regarded as the ignorance of some of their classmates. Both admitted to having gone out of their way to prevail over classmates and even instructors whom they found particularly galling. Referring to one such incident, Leo recalled that “I just wanted to make him look like a schmuck.” Thompson, confiding his frustration with classmates, said, “The people at the institute are over the edge….They’re dumb. But mostly I remember the hang-ups that people have that they can’t get over, and are not logical. So what I’ve come out of, from these classes, is the idea that people are not logical.”

Gloria acknowledged her sense of superiority to those who have not travelled the world. She admitted,

I don’t have too much patience with people who have no knowledge of the world and of all the different countries and things. When I’m away and I’m on a trip with people who are as enthused as I am and have done as much as I have, then, I have no problem with them. But the others, I don’t have any patience with.

On the other hand, my respondents also expressed much appreciation regarding the quality of discourse that occurs in certain classes. In fact, one respondent mentioned her regret that close friends—those with whom she had socialized for years but who do not attend adult learning classes—failed to share her curiosity and interest in world events. Jean, recalling a Great Books discussion group, said that “it opened my mind to a lot of ideas that had never occurred to me before.” Referring to the LRI courses in
general, she further stated that “I like the other people there and the exchange of ideas. The opportunity to exchange ideas on a serious subject.” As the result of his participation in discussions at the LRI, Alan remarked that “I’m thinking about things that I never thought about before.”

Self-Directed Learning

Gloria’s appraisal of herself as “not a student, per se” was not an anomaly. Although self-directed learning was evident in the lives of all my respondents, the value of this type of education was largely disparaged. The most extreme example of this came from the participant I call Thompson, who had worked extensively as a freelance writer. Thompson had retained his membership at the LRI in order to have unrestricted use of the university library. Despite this resourceful means of ensuring access to educative reading materials, he seemed uncomfortable equating this self-directed study as an act of learning. Rather, he dismissively described his research as something that he simply did “for fun.”

Overall, it was confounding to hear my respondents trivialize the value of their studies both within and outside the classroom. The exception to this pattern was found among those 3 participants who had not only been students but who had also sustained positions as course moderators at the LRI. Alan, Leo, and Lisa were positive about the benefits of self-directed study. They indicated that they had experienced both cognitive and affective growth through the highly self-directed activity of preparing and delivering courses. For example, as the moderator for a course concerning sociopolitical issues, Lisa claimed to have learned to be more open-minded to other points of view. Through the act
of accruing knowledge of various historical figures, Leo had been able to abandon his previous self-image for a more favourable self-understanding. Most impressive were Alan’s reported gains. As the result of preparing and delivering a course on morality and ethics, he had subjected his own behaviour to scrutiny. Finding incongruence between his thoughts and actions, he had undergone what in his opinion was a radical change in how he lived his life.

The changes described by these 3 course moderators correspond to Brookfield’s (1985) description of self-directed learning, which occurs when “process and reflection are married in the adult’s pursuit of meaning” (p.15). Further employing Brookfield’s definitions, it would appear then that other participants in the study used the techniques of self-directed learning without acquiring an attendant change of consciousness. They had set their objectives, chosen resources, designed learning strategies, and in some manner self-evaluated. Although these were certainly worthwhile accomplishments, it is interesting to note how poorly these 4 nonmoderating participants rated their success. This runs counter to Brookfield’s attestation that self-directed learners are likely to overestimate their attainments. In my assessment, all 4 nonmoderating participants underestimated the amount of self-directed learning they had achieved.

**Gender-Based Differences in Late-Life Learning**

As regards the respondents’ attitudes toward teaching and learning in an LRI, I could not help but note gender-based patterns. While acknowledging that these patterns may simply reflect a generational anomaly, I feel that in the interest of future research my findings in this regard must be noted. The first of these patterns is that the 3 men
interviewed greatly downplayed their role as learners. Thompson was critical of the class moderators and indicated that he found his colearners to be less than stimulating. His descriptions of university studies over the years carried a similar theme, wherein the instructors had been found wanting and various courses and programs, as a result, had been abandoned in disgust. Alan, the retired professional, went so far as to state that he hoped he was providing his classmates with more knowledge than he himself was receiving from their input during classes. Asked if he could recall having obtained a piece of learning that was new and surprising, he responded, “I’m grateful that I haven’t.” In fact, he seemed uncomfortable describing himself as a learner and steered the conversation away from questions that focused on his experiences as a student. Although he had taken courses at the LRI, he apparently identified far more with his concurrent role as an LRI moderator. Leo, who was also both a student and a course moderator, likewise seemed more interested in discussing his experiences at the front of the class. I was particularly intrigued by his description of how his teaching practice had improved. As an experienced LRI moderator, he no longer simply stated facts during his history courses. Rather, he now provided his students two alternative explanations for key historical events and allowed them to choose which interpretation they deemed most correct. He said, “I make an absolute manifesto. Unshakeable. To give two, at least two versions of the same event.” That the students themselves might be able to engage in discourse and arrive at further interpretations seemed not to have occurred to him. Compared to Leo, Alan apparently allowed for more discourse in his classes. Nevertheless, it appeared that neither moderator was comfortable with the notion that he
might participate as a colearner in the educative process.

On the other hand, all of the women interviewed seemed comfortable depicting themselves as learners. Lisa, who had been a student and also had served extensively as a class moderator, did not express the sentiment that she identified more with the role of teacher than that of learner. Indeed, her responses indicated that she viewed herself serving a purely facilitative role, whereas Leo and Alan identified with images of themselves as transmitters of knowledge.

I have examined this finding through the lens of sexual dichotism (Eichler, 1991) and find that neither my questions nor interpretation of data are guilty of treating the two sexes as discrete to the point where I am imposing categorical social distinctions between male and female. That being noted, I feel comfortable commenting on the distinct difference in the way that the men and women I interviewed described their experience of late-life education. In Rather than regarding themselves as cocreators of knowledge, the men seemed to see the instructors as authority figures. In Thompson’s case, I perceived that he took affront when these figures of authority challenged his knowledge claims. The women, by contrast, described themselves in terms that indicated a higher degree of comfort with the role of student. They also acknowledged the learning that occurred though the sharing of ideas. Bluma, who referred to herself as a “perpetual student,” spoke of one course where both the professor and students enhanced her appreciation of literature:

Our moderator was a retired professor of English, so often I wouldn’t like something very much when I read it, but by the time that he got to telling us how
good it was, I'd change my mind. That was nice. And also, it was a pretty high level of people in the class, so the discussion was very interesting.

Jean, in a similar vein, recalled one particularly stimulating course that involved regular discussion on a variety of predetermined philosophical topics. Describing why this course was a successful learning experience, she said, “I liked the other people there and the exchange of ideas....The opportunity to exchange ideas on a serious subject.”

Interestingly, Leo described himself specifically as a “lecturer” rather than as a moderator or teacher. A musician with some professional experience, he seemed to regard his role in the classroom as yet another form of performance. Alan, the other male respondent who designed and led courses at the LRI, echoed this description of his role in the classroom—what Pratt (1998) would refer to as a transmission view of teaching—even though his classes were apparently driven by discourse.

**Disorienting Dilemmas**

In the proposal stage of my research, I anticipated that some of my participants would likely be able to identify disorienting dilemmas they had experienced prior to enrolment in the LRI. I also expected that some might have had this experience as the result of returning to school. One of my objectives in this study was to examine how the disorienting dilemmas experienced since returning to school had affected the convictions and behaviour of my respondents. In particular, it was my objective to learn if any changes of outlook had features of perspective transformation or the development of wisdom.
As regards identifying disorienting dilemmas earlier in life, all but one of my respondents (Alan) provided anecdotal evidence of events causing significant change in life circumstances. Of those who identified these incidents, only 1 respondent (Bluma) insisted that no change of perception had resulted from these events. Alan, who either could not or chose not to provide this type of information, simply spoke of himself as having his “nose to the grindstone” for his adult life until retirement. Whether or not he actually moved through early and middle adulthood without periods of crisis, dilemma or self-doubt is, of course, unknown. In any event, this is not the image of himself that he chose to project. On the other hand, although Bluma did not hesitate to offer rather personal details concerning her life history, she insisted that it was not her custom to review the past. In fact, she espoused the idea that blocking out painful memories had been the key to her happiness.

In my interviews, question 7 asked participants to describe a time of rich learning that was not necessarily gleaned from books and study but rather from life experience. As a response, the death of a family member was the most frequently mentioned event. This was followed by mention of travel as a means of heightening sensitivity to the peculiarities of oneself and one’s culture. Thompson described a period of learning when he was a young adult living in the jungle of Costa Rica.

I had been raised with the idea that—you know, which people were in the 50s—that, you know, if you don’t have arms, if you don’t have civilization, then you’re really helpless. And, actually I did at one point start to starve quite seriously in the jungle. Because I didn’t know what to
eat. Then I found out I was starving in a grocery store. In a delicatessen.

And... I learned how limited my background had been, and that basically how much better educated the locals were.

Another respondent who had experienced a disorienting dilemma while travelling was Gloria. In her words,

When I learned about different cultures in different countries, I thought, “How do they live like this? How can they smile?” Like, I’ve had seven trips to Africa. I love Africa. And the conditions that they live under, and I think, “How can they be so happy?” You know, the children are barefoot, and they’re hungry, and they’re dirty. But they have these beautiful faces, and they’re laughing, and they’re smiling. It just blows me away. I just don’t understand it.

In contrast, interview question 6 asked respondents to describe the most important things they had learned as the result of their LRI education. Although some were able to identify what Brookfield would refer to as critical incidents in their earlier classroom-based education, only 2 identified experiences from the LRI. These 2 respondents were Alan and Leo. Significantly, both were the only respondents who entered retirement lacking a history of classroom-based continuing education. Although Alan spoke of involvement in professional associations, and Leo referred to a lifetime of heavy reading, until retirement both seemed to have regarded education as a terminal and utilitarian activity. Alan, in particular, seemed to have understood learning strictly as a means to a tangible end. Reflecting his pragmatic view of learning, his first venture into postretirement education was with the goal of acquiring the instrumental skills required to
take over his wife’s accustomed duties as the household cook. To this end, he had enrolled in cooking classes at a nearby college. Upon graduation, he dismissed his wife from the kitchen.

Later in his retirement, Alan became involved with the LRI and eagerly accepted the invitation to moderate courses. It was while conducting research on a noninstrumental topic—ethics—that he began the process of what became a shattering moral reappraisal. In Mezirow’s (1998) taxonomy of critical reflection on assumptions, this is referred to as moral-ethical CSRA (critical self-reflection on assumptions). Throughout the preparation and presentation of this discourse-based course, he arrived at some disturbing conclusions regarding his own previously held assumptions. For the first time in his life, Alan could see that he had failed to exercise his own judgment and had simply gone along with what Brookfield lists as the hegemonic “part and parcel of everyday life – the stock opinions, conventional wisdoms, or commonsense ways of seeing and ordering the world that people take for granted…the conspiracy of the normal” (2000, p 138).

Alan was adamant during our interview that I should understand just how significant this change of outlook was in his life. Prefacing his description of the critical incident, he stated,

Well, it should be telling you just how animated I am about this as I try to sit back and I can barely do it, and I start leaning forward. I have a passion about what I’m talking about. To me, this is not an, “Oh, by the way.” Now I’m going to tell you about a really life-changing thing. Okay?

During my interview with Leo, the significance of critical incidents could not be
easily overlooked. By his own admission, Leo “leaks terribly,” and was given to tears when discussing key learnings. Unlike Alan, however, his critical self-reflection pertained not to moral and ethical assumptions but rather to problematic feelings, dispositions, and their consequences. Again referring to Mezirow’s (1998) taxonomy, Leo’s would be considered a therapeutic CRSA. The perspective transformation that Leo gained during his studies had to do with his own self-image. Becoming a successful student and then a successful moderator in the LRI apparently allowed him to reconceptualize himself and to let go of negative information about his intellectual abilities. Recounting a significant incident in his recent studies, Leo referred to the accolades he received after demonstrating his depth of knowledge about President Truman. “I have to say to you, that was one of the happiest moments of the last 6 years—when my intellect was actually recognized.”

It should be added that Leo experienced retirement as a disorienting dilemma. He admitted that it was a painful experience for which he was psychologically unprepared. By his account,

It was very difficult. For me, it was crushing. I became nobody. This is the truth. I became nobody. In the afternoon I began to have a drink. I never drank before. I’d have a drink if I had time. I began looking forward to my afternoon drink.

In the process of coming to terms with his change of circumstances, Leo moved quickly toward the last four steps in Mezirow’s (2000) 10 phases of perspective transformation (see page 20). Taking into account the peculiarities of his own situation, he (step 7) began acquiring skills and knowledge at the LRI, (step 8) began trying out his
new role as student and moderator, (step 9) built competence and confidence, and (step 10) reintegrated into life based on conditions dictated by his new perspective of himself as a student and as a lecturer.

Other respondents claimed to have experienced disorienting dilemmas outside of the classroom since enrolling in the LRI. The death of Jean’s husband was still quite recent at the time of the interview, and the significance of this change appeared not to have quite clarified in her mind. Nevertheless, she mentioned that she had decided to transfer to what she perceived might be a more challenging LRI at a different university in the city. This competing venue is the same LRI that Lisa spoke of joining. A recent disorienting dilemma in Lisa’s life outside of the classroom had perhaps given her the impetus to make this move. In encountering an ideological dilemma, her assumptions about the inherent goodness of one political party had been shattered. This occurred when the party that she had supported for years announced that it was endorsing one side in a violent political situation overseas. To Lisa, this was intolerable, in that the party to which she belonged was turning its back on the human rights of an ethnic group that laid claims to disputed land. In her words, “That was very traumatic for me… it was an awakening and an awareness that everything that I believed that they stood for wasn’t as concretized as I had expected.” It should be noted that this dilemma was particularly painful for Lisa in that she was by necessity ending her relationship with some strongly partisan friends as the result of quitting this political party.

It appears that for Jean, Bluma, and Lisa, disorienting dilemmas outside of the classroom were ongoing. At the time of my interview with Lisa, the changes in her life
had reached a point where she was able to articulate her emotional reaction. For Jean—still in mourning for her husband at the time of our meeting—the point of articulation seemed not yet to have been reached. Bluma, having entered a new relationship, appeared to be in what Erikson et al. referred to as “an arena for an essential reassessment that might otherwise be deferred” (1986, p. 186). As will be discussed later, Bluma’s apparent desire to defer this self-appraisal belongs to a pattern of behaviour that I will refer to as resisted perspective transformation.

**Interrupted Narratives**

For Leo, retirement was clearly a disorienting dilemma. It brought him great emotional anguish. He recounted having said to his wife, “I’m nothing,” as a reflection of how he felt after selling their business. The loss of his identity as a businessman was crushing. Although he had begun his involvement with the LRI as a student, he had soon moved on to become a moderator. This elevation, as it were, from the role of recipient to provider of knowledge was not only restorative but also transformative. In fact, it may have provided Leo with a means of completing what Cohen (1996) refers to as an interrupted narrative. This term refers to a sense that one’s life story has been broken by the unfinished business of an incomplete education. An interrupted narrative may have contributed to the severity of Leo’s disorienting dilemma upon retirement. Further, the revision of this narrative by serving as a course moderator at the LRI may very well have sped his reintegration into society. Assuming the role of lecturer and, in Leo’s words, to “have my intellect recognized” had clearly been a vital part of his retirement experience.

Another respondent with an interrupted narrative was Gloria, who had carelessly
chosen a program in secretarial studies as a young woman. At the time, she was unaware that what was intended merely as a way of earning a living until marriage would become a lengthy career. Early in her married life, Gloria was widowed and forced to work in offices to support her two young children. While serving as a secretary, she ascertained that many of the university graduates she worked for were in fact poorly educated. She resented the fact that she possessed more sophistication, attributable to her earlier travels and life experience. Moreover, she resented that, in comparison to some of those whom she served, she possessed a more reliable set of basic skills, such as the ability to spell.

After retiring, Gloria enrolled in the LRI, traveled extensively and began writing books about her journeys. Through these activities, she felt compensated and redeemed for having failed to attend university. In her words,

I have learned more in the last–I guess I retired in ’86–and I say to people,

“My poor old brain has worked so hard since I’ve retired.” Learning the computer, and, oh–there are just so many things that I’ve learned. It’s been a real education as far as I’m concerned.

Nevertheless, when questioned further, Gloria downplayed the consequence of her education at the LRI. Although she seemed to feel that she had proven her intellectual capacity as equal to that of the university graduates for whom she had worked, there was a prevailing sense that the lack of evaluation and accreditation somehow devalued the worth of her LRI studies.

As regards the interrupted narrative, both Leo and Gloria had unwittingly adhered to Cohen and Piper’s (2000) suggested method of modifying the dissatisfying aspects of
one's personal history. Cohen and Piper encourage older adult students—especially those with incomplete educations—to "revise their subjective interpretations of life events and construct a more critical perspective" (p. 206). This can be done in a class setting through the medium of a written narrative. In so doing, the students have the opportunity to view themselves from a different point of view. Narratives of failure can be revised, both literally and psychologically. By writing her memoirs through a travelogue, Gloria reframed the story of her struggles as a single mother and secretary. In her new narrative, she presented her life as a tale of triumph over adversity. Her travel to exotic locations can hence be understood as the reward for having suffered the insult of working for men and women she did not respect. Likewise, through the LRI, Leo was able to discard his previous image of himself as a high school dropout. In his rewritten narrative, the reward for supporting a family in an undistinguished career was the public recognition he gained late in life as a "shit-hot lecturer" on history.

Although an upbeat written memoir or a prestigious late-life avocation are excellent means of reconstructing one's less than satisfactory life story, these are not the only ways in which an older adult can achieve the task of repairing an interrupted narrative. The older person, according to Erikson et al. (1986), will often revise the story of his or her existence in memory. Erikson arrived at this conclusion during a series of interviews conducted as part of a longitudinal study on parents and children in Berkeley, California. Although notes from early encounters with the parents indicated that many had experienced strife, Erikson and his coauthors were surprised to hear reframed and upbeat versions of these life histories years later. The subjects described their pasts in
terms that downplayed or even omitted painful details. I speculate that, to an extent, this was also the case with my subjects. Although they made reference to painful events that would certainly qualify as failures in their lives, only one respondent—Bluma—expressed a sense of regret over the choices made. Further, all but Bluma appeared to have integrated disappointments into a narrative depicting valuable life lessons won through adversity.

For example, Thompson, who never completed a university degree despite many attempts, pointed to his writing career as evidence that his failure in formal postsecondary studies was the result of having a mind more inquiring and creative than most others. For every disappointment suffered over the years, Lisa described a corresponding increase not just in her empathy but also in her degree of social activism. Jean, whose daughter ran afoul of the law, redeemed herself from what she might have regarded as a failure in parenting. She did this by studying criminology and serving as a volunteer probation officer. Alan, describing the first 40 years of his life, simply stated that “I had my nose so close to the grindstone that I couldn’t see right, left, or anywhere else.” Although he did not provide the details of his actions, he indicated a sense of shame at having failed to always work toward the common good in his career. His course on morality and ethics at the LRI appears to serve, in his mind, as a redemptive act.

**Critical Reflection**

A key symptom of transformative learning is the act of critical reflection (Brookfield, 1995; Mezirow, 1998). Through interviews with my subjects, I noted that some of their recounted experiences adhered closely to Brookfield’s taxonomy of assumptions for critical reflection. Matching the recounted experiences of my
respondents to these three varieties of critical reflection allowed me greater insight into their experience to date with perspective transformation. This information is displayed in Table 2. The respondent Bluma is not represented, as she denied having engaged in anything that could be described as critical reflection.

Paradigmatic assumptions (Brookfield, 1995) refer to the human propensity to structure the world using fundamental categories. The paradigmatic assumptions serve as organizational mechanisms for our various world views and are difficult to identify. These assumptions are so entrenched in our way of thinking that they can be hard to remove. Jean encountered a paradigmatic assumption in middle age, during her study of criminology. Her previous understandings of policing and of how control is enforced in society were changed as the result of this learning. Her paradigm of law enforcement shifted. The cognitive process involved in changing this paradigmatic assumption is comparable to that involved in what Mezirow (1998) would refer to as premise reflection.

In a similar vein, and within the same category of critical reflection, I identify Thompson's experience of publishing a book that analyzed and condemned various political systems. During a moment of clarity, he recognized that his reputation as a forward-thinking author was based not so much on his originality but rather on the intellectual timidity of others. In his words, he realized "how much I was tied up with conventional ideas, and how much—even though I was never considered very conventional—I had accepted a hell of a lot of conventional ideas." For Jean and Thompson, the critical reflection in their particular situations seems to have provided both with a startling glimpse into how each human mind constructs reality based on
Table 2

The experiences of participants examined through Brookfield’s assumptions for critical reflection

<table>
<thead>
<tr>
<th>Paradigmatic assumptions</th>
<th>Prescriptive assumptions</th>
<th>Causal assumptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>How we categorize life experiences</td>
<td>What we believe should occur in various situations</td>
<td>How the world works/how it might be changed</td>
</tr>
</tbody>
</table>

**Jean**
The study of criminology: she recognized implicit policing throughout society at all levels

**Gloria**
Secretarial work: she had wrongly expected that the university graduates for whom she worked as a subordinate would all be skilful and intelligent

**Lisa**
Political disillusionment resulted when the party she had endorsed for years took a partisan position on an international situation

**Thompson**
Publication of his book: he recognized the orthodoxy of his thinking, although he had previously believed himself to be unconventional

**Leo**
Retirement: the end of work caused him to experience a traumatic loss of identity

**Alan**
Moral self-appraisal resulted from teaching a course on morality and ethics
artificial yet widely circulated blueprints.

Prescriptive critical reflection refers to our notions about what we think should or must take place during specific circumstances. For Gloria, this occurred when she began working as a secretary for a group of university graduates. Her assumption, upon entering this situation, was that she would be working to serve an informed and sophisticated staff. By her report, this was not the case.

Here they all had university degrees, and yet some of them were downright stupid! You know, I felt very superior at times because, you know, they would do stupid things. And it wasn’t just because they were young. It was just if they’d used a little common sense they would have seen it. But I really felt quite superior to a lot of them. Yet I’d only been to high school.

Upon learning that her own knowledge was frequently superior to that of those for whom she toiled, Gloria critically reflected upon the meaning of higher education. That she was smart and capable and yet regarded as being somehow inferior to the university graduates seemed to have been significant in how she experienced her secretarial career.

For Leo, prescriptive critical reflection occurred soon after he retired. In his words “It was very difficult. For me, it was crushing. I became nobody.” Suddenly, many of the rules of his adult life no longer applied. When his daily routine as a breadwinner suddenly ended, he was forced to evaluate his taken-for-granted assumptions about his role in life. Ultimately, it was the LRI that helped him to develop a new prescription for living.

Causal critical reflection involves our assumptions about how the world works
and how it can be changed. Although perhaps the easiest to identify, this type of reflection is no less painful to experience. Lisa had certainly gone through this type of reflection, having recently been disillusioned by the political party she had vigorously supported. The other participant whom I identify as having experienced this type of critical reflection is Alan. As the result of his study of ethics at the LRI, he had been forced to reconsider the meaning and function of morality in society. In his words:

What is moral is not necessarily ethical, but it can be both moral and ethical, but not necessarily so. And now as you start testing this against all the sorts of decisions you have to make every day in your life, watch what happens. You don't accept anything anymore. The majority can be wrong.

Of special significance to this study is that the two participants who had not been involved in adult education until after retirement were the two who experienced critical reflection upon or just prior to enrolment in school. Leo's self-appraisal upon retirement resulted in a new identity through the venue of late-life education. Alan's moral self-appraisal was the direct result of discourse within the classroom. These reactions parallel those described in Mezirow's (1978) study of the experience of women attending college after a hiatus from formal education, from which he developed his first ideas concerning transformative learning. As was the case with Mezirow's women, my two novice adult students moved from personal crisis through self-examination to reintegration into society.

Resisted Perspective Transformation

Missing from this enumeration of critical reflection is the participant identified as
Bluma. Despite what appear to have been an almost overwhelming number of possible disorienting dilemmas in her life, Bluma had apparently resisted critical reflection in its many forms. Intriguingly, Bluma was also the individual with the most evidence of learning through accredited university study.

Taylor (1998), remarking on the results of a wide collection of studies, refers to the need for a predisposition toward transformative learning. Readiness for this type of learning, he notes, might be contingent upon the adult learner’s developmental stage. Therefore, some adults simply might not be able to engage in a perspective transformation. Considering this possibility as regards Bluma, I take a different view. It appears to me that, despite having all the requisite knowledge, skills and abilities for transformative learning, Bluma had chosen not to learn at this level. I have chosen to use the term *resisted perspective transformation* because I detected evidence that Bluma had, in fact, engaged in objective critical reflection. This became apparent only when she was pressed to provide an antonym for the word *wisdom*. She offered “stupidity, dumbness. People are their own worst enemies. There are people who antagonize themselves and don’t know it.” That she was able to offer the idea that stupidity is the opposite of wisdom, and that she could describe what she considered to be the qualities of a stupid person, indicated to me that she had critically assessed the assumptions of others. Nevertheless, this objective appraisal is certainly the most rudimentary form of critical reflection, as it does not require the individual to assess his or her own personal meaning schemes. Missing from Bluma’s interview responses was evidence that the critical self-reflection required to acquire a new perspective had taken place. While acknowledging
the burden of her complicated personal history, she confided that she coped with this by choosing not to reflect: “I had some awful things happen in my life .... I think I have my mother's temperament—which is to not think about the past too much. And to, sort of, face the day. Because I have to.”

In discussing her circumstances at the time of our interview—having taken up residence with a new lover at age 80—Bluma presented the most convincing evidence that she was straining to resist critical reflection. She referred to her stoicism simply, calling herself “a survivor.”

Well, having moved into this situation that sort of... I find I am reviewing my life more than I have done for a long, long time. Because I’m going back to my first marriage, which I tried, tried, and try not to think about at all. And I don’t want to think about what a wimp I was. And I had no maturity whatsoever, and I couldn’t handle the situation at all. And I don’t think I could have changed him. And I feel that I just practically curled up into a little ball and couldn’t handle anything that was—and I’ve certainly matured since then. But I married much too young. Everyone at that time did. It was right after the war. And everybody got married and had kids... I’m sure there are things that I should have done differently, but I’m not going to spend any time worrying about it.

Erikson et al. (1986) remark on the significance of a new romantic and/or intimate relationship during what he refers to as the *eighth stage* of psycho-social development. Finding oneself in this situation, the much older adult has the opportunity to engage in a personal assessment that might otherwise have been indefinitely postponed. Bluma
admitted that she recognized this inclination in herself. She also acknowledged her
ongoing struggle not to reflect on her errors of the past. Seen from the standpoint of
transformative learning theory, Bluma was fighting against the development of
perspective transformation. In her mind, the ability to blunt her emotions and curtail
reminiscence was a positive family trait. As she explained,

I think I have my mother’s optimism…. When my father died, she had a big
house that she’d lived in for 50 years. And after a few years she sold the house
and moved to an apartment. And a few months after we asked her if she missed
her house, she said, “That’s in the past. I never think about it.” So I’ve become
like that.

Resisted transformation can be seen in other participants besides Eluma. Both
Gloria and Jean offered that their studies—which, in Gloria’s case, were complemented by
her travels—had caused them a level of discomfort with their understanding of the human
condition. Jean, who read copiously about world politics and had in fact been trained as a
journalist, described herself as being helpless to effect change. Gloria, relating her sense
of feeling overwhelmed by what she had witnessed while travelling, insisted that she
could not even understand the problems, let alone begin to solve them.

Both Mezirow (1991) and Clark (1992) suggest that the final stage of perspective
transformation involves a change of behaviour. I recognize Lisa and Alan as the 2
respondents who demonstrated this step. Since attending the LRI, Alan had revised his
moral/ethical frame of reference to the extent that he had left his synagogue and
conducted his daily affairs with a level of transparency that even he found surprising.
Lisa, who, like Jean and Gloria, experienced pain and confusion when considering the inequities between rich and poor, was seeking to allay her pangs of conscience by becoming involved in social activism at a grassroots level.

**Meaning Perspectives**

In analyzing changes in how my respondents understood and organized reality since attending an LRI, I related their responses to Mezirow’s (2000) six varieties of meaning perspective: epistemic, psychological, sociolinguistic, moral-ethical, philosophical and aesthetic. For illustration of how I interpreted each participant’s experiences through the lens of meaning perspectives, see Tables 3 and 4.

Organized under the first variety—epistemic—I analyzed how my participants at the LRI claimed to be learning. It is interesting to note that all but one respondent indicated a preferred form. Gloria, the writer of memoirs and travelogues, favoured narrative as a method of learning. Both Leo and Thompson indicated that their learning had been based on a self-directed program of research and writing. Jean and Lisa confessed that their preferred manner of learning was through discourse. Bluma, who seemed determined to eliminate the possibility of emotional contamination from her learning, insisted that even her liberal arts studies were approached from a technical, instrumental standpoint. From her perspective, courses on history and literature involve the acquisition of facts, figures, and an understanding of theory.

The one respondent who indicated a variety of learning methods was Alan—the professional who had experienced a perspective transformation as the result of returning to school after retirement. Before attending the LRI, he had a strictly instrumental
<table>
<thead>
<tr>
<th>Participant</th>
<th>Epistemic Meaning Perspectives (How one learns)</th>
<th>Sociolinguistic Meaning Perspectives (Cultural expectations and how one interacts with others)</th>
<th>Psychological Meaning Perspectives (Changes of self-concept)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alan</td>
<td>Instrumental, discourse, self-directed research and writing, classroom role-play. Instrumental</td>
<td>Improved listening skills</td>
<td>Critical self-appraisal of moral and behaviour, resulting in new self-concept. None reported</td>
</tr>
<tr>
<td>Bluma</td>
<td>Narrative</td>
<td>None reported</td>
<td>None reported</td>
</tr>
<tr>
<td>Gloria</td>
<td>Discourse</td>
<td>Increased appreciation of cultural differences through immigration to Canada.</td>
<td>None reported</td>
</tr>
<tr>
<td>Jean</td>
<td>Discourse</td>
<td>Improved listening skills</td>
<td>None reported</td>
</tr>
<tr>
<td>Leo</td>
<td>Self-directed research and writing. Classroom role-play.</td>
<td>Improved listening skills</td>
<td>Compensated for incomplete education. New post-retirement self-concept as instructor.</td>
</tr>
<tr>
<td>Lisa</td>
<td>Discourse</td>
<td>Improved listening skills</td>
<td>None reported</td>
</tr>
<tr>
<td>Thompson</td>
<td>Self-directed research and writing</td>
<td>Increased appreciation of Canadian culture through travel</td>
<td>None reported</td>
</tr>
<tr>
<td>Participant</td>
<td>Moral/Ethical Meaning Perspectives <em>(Conscience, morality)</em></td>
<td>Philosophical Meaning Perspectives <em>(Religious doctrines/worldview)</em></td>
<td>Aesthetic Meaning Perspectives <em>(Tastes, standards re. beauty)</em></td>
</tr>
<tr>
<td>-------------</td>
<td>----------------------------------------------------------</td>
<td>---------------------------------------------------------------</td>
<td>------------------------------------------------------------</td>
</tr>
<tr>
<td>Alan</td>
<td>Intense self appraisal</td>
<td>Abandonment/questioning of religious rituals and increased appreciation for relationships within faith community</td>
<td>None reported</td>
</tr>
<tr>
<td>Bluma</td>
<td>None reported</td>
<td>None reported</td>
<td>None reported</td>
</tr>
<tr>
<td>Gloria</td>
<td>None reported</td>
<td>Perspective in transition. Participant trying to understand how those in great poverty can be happy</td>
<td>Perspective in transition. Standard of living of the poor being examined for evidence of beauty</td>
</tr>
<tr>
<td>Jean</td>
<td>None reported</td>
<td>None reported</td>
<td>None reported</td>
</tr>
<tr>
<td>Leo</td>
<td>None reported</td>
<td>None reported</td>
<td>None reported</td>
</tr>
<tr>
<td>Lisa</td>
<td>None reported</td>
<td>Reserving judgment in order to understand new points of view</td>
<td>None reported</td>
</tr>
<tr>
<td>Thompson</td>
<td>None reported</td>
<td>None reported</td>
<td>None reported</td>
</tr>
</tbody>
</table>
approach to learning, as was in evidence from his attitude toward learning to cook. Less than a decade later, as a successful moderator and student at the LRI, his repertoire of learning methods included discourse, self-directed study, and role play. In this latter method of learning, Alan revealed that he had, at one point, dressed as a woman and "wore the pearls" in order to participate in a class concerning important women throughout history. Leo, who also had experienced a perspective transformation since attending the LRI, likewise admitted to having used role play as a learning method. Unlike Alan, however, he perceived that this was done for the benefit of his colearners. From his perspective, by assuming the role of an American president he was, in fact, providing his colearners with instruction. Alan, conversely, confided that his experience with role play had left him with more questions than answers, not only regarding the political figure he portrayed but also regarding the role of women in society.

Organized under sociolinguistic meaning perspectives, I analyzed the reported changes in my participants in (a) their interactions with others and in (b) their cultural expectations since starting their studies at the LRI. Lisa, Leo, and Alan were adamant that their listening skills had developed significantly since returning to school. It comes as no surprise that all 3 were not only students but also served as moderators at the LRI. Leo claimed that he brought already advanced listening skills to his teaching practice as the result of having been a successful salesman for much of his life. Alan also made reference to the communication skills that had won him career success. From his perspective, being a good communicator required the ability to listen and the ability to keep an open mind.
Lisa, the social activist, reported that learning when not to speak had been just as important to her as knowing what to say:

I think one of the things I had to learn, particularly as a moderator—and this was very hard for me—to listen to points of view that I was directly opposed to. And as a moderator, not reacting to it. And that was the hardest thing for me, I think. I’ve always had good listening skills, because I needed it for my work. But I think that not jumping in when I hear somebody say something that really is opposed to everything I believe in—I think, for me, that was the biggest lesson I’ve learned.

As regards the other participants, Bluma was remarkable in that she alone insisted that she had experienced no changes in her communication skills or relationships as the result of her studies. Gloria, Jean, and Thompson, however, all reported an increased understanding of their own culture through comparing it to others. Gloria’s level of understanding improved when she enrolled in a course at the LRI and started writing her memoirs in the form of a travelogue. Remarried after 30 years as a widow, she traveled the globe with her husband. Both before and after her trips, she engaged in extensive self-directed study about her destinations, followed by a written narrative on each. The experiential learning offered through travel seemed to be challenging her to revise her sociolinguistic meaning perspective. She clearly found it difficult to integrate the human conditions she had witnessed during her travels with what she understood as being of value in her own society.

Both Thompson and Jean reported that their cultural expectations had begun to shift much earlier in life: for Jean, when she moved to Canada from the U.S., and for
Thompson, as a young man living temporarily in Costa Rica. Jean’s learning in this arena had continued through discussion groups at the LRI, whereas Thompson attributed his continued learning to self-directed study at the LRI host university library.

Organized under the category of psychological meaning perspectives, I analyzed evidence from my participants that their self-concept had changed as the result of their late-life education. Only two of my participants—Alan and Leo—provided evidence that this was the case. For Leo, success in the classroom had allowed him to make peace with memories of his early failure as a student. In Alan’s case, the study of morality and ethics had imposed a disturbing self-appraisal with life-altering repercussions. This experience is also represented under moral-ethical meaning perspectives in Table 4.

Of particular interest in Table 4 is the representation of the transitional phase that the participant Gloria was undergoing at the time of our conversation. Here, under the headings of philosophical meaning perspectives and aesthetic meaning perspectives, it can be seen that she was confronting what could be understood as a disorienting dilemma. Both her existing worldview and standards were being challenged. It should be recalled that as a working single mother throughout much of her adult life, Gloria’s consuming focus had been to achieve financial security. This had given her both a sense of purpose and pride. Nevertheless, since retirement, her assumption that material comfort was essential to happiness had been challenged. Throughout her many trips to Africa, she had seen evidence suggesting that it is possible to find meaning, contentment and joy in life even while living in primitive conditions. Clearly, this information was a source of cognitive dissonance. Gloria’s resolution of this contradictory information
would be interesting to follow, as it could be the foundation of a late-life perspective transformation. Further, it could serve as a springboard for wisdom.

Wisdom

Ardelt reminds us that the acquisition of wisdom-related knowledge takes time, and hence is likely to increase with age (2000). It is obtained through “personal life experiences, self-reflection, self-awareness, and the transcendence of one's subjectivity and projections” (p.783). I will refer to the increase of this type of knowledge as *wisdom gains*.

It surprised me to learn that the acquisition of wisdom-related knowledge was not an overt motivation for attending classes at the LRI. I had wrongly assumed that at least some of the older adult students would articulate a desire to make wisdom gains. What I have since come to understand is that wisdom, although defined variously, is generally regarded as such an ultimate and admirable state that even those who might be considered sagacious are unwilling to apply the word “wise” to their condition. In fact, taking into consideration the Eastern definition of the wise as those who are discreet (Takahashi & Bordia, 2000), it seems certain that the truly wise would be the least likely to describe themselves as such.

Although none of my respondents spoke of themselves in terms of striving to become wise, all but one allowed that they had made wisdom gains. Interview questions 7 through 12 were successful in eliciting relevant information regarding the role of wisdom in their lives. Further, question 6 provided information that allowed me to interpret how the development of wisdom compares to the experience of perspective
transformation.

Four of my respondents cited the passage of time and accumulated experience as ingredients necessary for the development of wisdom. Gloria, who was a widowed single mother for 30 years, made the following comments regarding the development of wisdom:

Maybe some people are born with it. But I think if you don’t have wisdom by the time you reach my age, there’s something wrong with you. Oh yes, it must come with age, because every experience you go through you can’t help but improve, you know. Usually, when I do something stupid, well, I only do it once. I don’t do it more than once. But I think that definitely it comes with age. And maturity.

Alan, when asked to comment on the development of wisdom in his life, also spoke of maturity as a comparable, if not identical virtue. In describing its evolution, he commented, “It didn’t just happen. It was a progression.” Lisa echoed the sentiment that experience is vital in wisdom acquisition, as did Jean. Of the 4 respondents sharing this view, Alan and Jean further indicated that they felt the experience of others could be of great use. In particular, both respondents said that the ability to learn from comparative history was instrumental in developing wisdom. Keeping informed and also being able to draw parallels between events from the past to those in the contemporary world were mentioned as indicators of wisdom acquisition. Jean mused,

What’s wisdom? I think it’s the ability to use experience—either your own experience or vicarious experience—for example, through reading history...if you read Roman history and you can apply Roman history and the history of the fall
of the Roman Empire to what’s going on in the States today. And that would be wisdom.

Alan concurred with this view and expanded to include the act of drawing parallels to one’s own life while listening to others recount their personal histories. By way of example, he spoke of a woman in one of his LRI courses being overcome with emotion in the midst of a class presentation regarding her experience of living in a war zone. Rhetorically, Alan asked, “Now, if you think that doesn’t make you wiser...?”

One of my respondents who would likely have challenged this claim was Jean. She distinguished the difference between simply noting patterns in events and acting upon what one learns by making connections. In her words, “You have to have both the ability and the willingness to apply your experience. And so the opposite would be the unwillingness to apply what you might have read or experienced to what’s going on today.” Interpreting this through the lens of transformative learning, what Jean referred to here was subjective reframing in critical self-reflection (Mezirow, 1998). This type of reframing can also occur when one applies the meaning of another’s narrative to one’s own lived experience. Following Jean’s implicit theory, then, we would say that although Alan was able to engage in subjective reframing while listening to the war zone narrative in his LRI class, the true learning would not occur until he had found a way of making practical use of this new knowledge.

Painful rather than joyous experiences were noted by my respondents as contributing to the sense of having learned and of having acquired wisdom. If these events are understood as being disorienting dilemmas, then the evidence presented by my
respondents contradicts Brookfield’s (1995) assertion that positive experiences can also lead to perspective transformations. For example, Gloria recalled the life-altering early years of her widowhood as a time of nearly paralyzing pain and fear. It was during this period that she by necessity changed her expectations to the point that she could lead an independent and financially successful life.

As my mother used to say, the light came back in my eyes when I started working. Previous to that, I was just a zombie... it was my job to look after those babies, and that was my whole world. So, once I started back into the world where I was meeting people and I had to look sharp, then I began to come back to life. But for those 3 years, I was right out of it. When I look back, I think, “My goodness!”

Alan referred, albeit obliquely, to a period of serious, shattering self-appraisal after studying ethics at the LRI. Although the emotional experience might have been painful, Alan’s apparent reticence to speak of personal weaknesses made this difficult to discern. With somewhat more candour, Lisa described a period of physical suffering she endured less than a year before our interview. As the result of an injury, she had been limited to bed rest. After 3 months of painkillers, isolation, and relative immobility, she arrived at a new appreciation for the suffering of those with chronic disabilities. Lisa referred to this as a “heightened level of empathy.” In contrast to the viewpoint offered by Jean and Alan, Lisa believed that firsthand experience imparts a level of understanding far richer than that acquired vicariously. In her words, “I’ve worked with psychiatric patients, and, yes, I’ve always been empathetic...but I didn’t have the
experiential. And that’s very different.”

Jean, the recently widowed respondent, spoke of a hardship that served to alter her worldview. Although it had taken place much earlier in life, while she was in her late 30s, she still remembered it as an incident of significance. “I experienced the loss of a child. Certainly, it was a changing event. Because obviously, I was not in control anymore. Things were happening that I could not change, that no one could change.”

In contrast to the view of wisdom being acquired through experience is the understanding of wisdom as the outcome of factual knowledge and critical analysis of text-based materials. Among my respondents, only 2 supported the view of wisdom belonging purely to the cognitive domain. I find it intriguing that both respondents are also the only 2 who reported unsuccessful academic careers earlier in life. Leo, the self-made businessman, was a high school dropout. Thompson, the freelance writer, had abandoned many attempts at university studies. Given the histories of these 2 men, it is intriguing that they would attach such high value to the type of learning in which they were least accomplished. Moreover, it was unexpected to find that they considered this type of learning to be the source of wisdom. In defining wisdom, Thompson said, “I think it is a combination of factual knowledge and interpretation.” Elaborating on how this process occurs, he hypothesized that wisdom involves critical thinking and questioning taken-for-granted assumptions. In essence, he supported the view of wisdom as the result of higher order thinking—or, using the language of transformative learning, the process of what Mezirow (1998) would refer to as critical reflection. “I’m very much concerned with conventional wisdom,” said Thompson. “Most of us operate most of the time by
Leo’s definition of wisdom involved not only factual knowledge but also the communication skills required to share this information with others.

Wisdom is your acquired knowledge being put to use. Wisdom in your head is of no use...wisdom is the ability to express your knowledge.

Wisdom is if you can express what you know cogently and make people understand what it is you’re trying to say.

Scrutinizing this through the lens of transformative learning theory, I identified Leo’s definition of wisdom belonging within Mezirow’s (1991) communicative learning domain. In this frame of mind, one is able to appreciate what others “communicate concerning values, ideals, feelings, moral decisions, and such concepts as freedom, justice, love, labour, autonomy, commitment and democracy” (p. 8). I extrapolate from our interview that Leo perceived himself to be a benefactor of this type of knowledge rather than a beneficiary. His mode of communicating this knowledge was through his interpretation of historical events.

In contrast, 3 of my respondents indicated that wisdom is not something one can derive from school, books, or study. By way of example, Alan referred to his grandfather, an unschooled tailor. His practical abilities and devotion to family, remembered fondly 60 years later, served as exemplars of wise living to Alan. In somewhat the same vein, Jean reflected on a brother who appeared to have stopped reading and learning immediately upon graduation from university. Remarking on the nature of wisdom, Jean said, “It’s not something you get from books. Because there are people who are wise who
are maybe even illiterate, and people who read books and are very literate who are very unwise.” Gloria allowed that some wisdom might be derived from formal education, but moderated this view by saying, “I think that the education you get from living is far better than what you get in school.”

Of all my respondents, only 1 identified wisdom as being derived from more than one way of knowing. In defining wisdom, Lisa said it is “the ability to know what is possible. I think it’s also the ability to listen to other people and be empathetic.” Pressed to speculate how one develops wisdom, she noted a distinction between cognitive and affective skills. “I guess it depends on what sort of wisdom you’re looking at. I think there’s wisdom of being very academic and very knowledgeable. But the wisdom that I think is more important for me is interpersonal relationships.”

Although Lisa did not specify a connection between these two types of wisdom, I would suggest that her definition is similar to Sternberg’s (1998) balance theory. Sternberg proposes that “wisdom by definition is oriented toward a balance between self-interest, the interests of others, and of other contextual interests to achieve a common good” (Staudinger et al., 2005, p. 196). In speaking with Lisa about her approach to life—for example, how she structures her daily routine around her work as a social activist—it appeared that she was striving for the equilibrium that Sternberg advocates. She said,

What’s important in my life is that I balance the stuff that I want to do because I feel I’m doing something really worthwhile, and doing stuff that is just my pleasure. And I think I always try to make a balance between the two. And I hope that’s how it will continue.
As a widowed woman for 18 years, at age 71 and suffering from a disability, it appeared that Lisa was the least financially stable of all my respondents. She further distinguished herself by being the most active in social and political causes. When asked to identify her personal ideal of wisdom, she said, “It’s empathy. Being able to put yourself in somebody else’s position.” Asked to define the opposite, she identified an inflexible, dogmatic state of mind. In her words, the opposite of wisdom would be “stupidity and being close-minded….There’s no gray where it’s all black and white.”

The ability to tolerate ambiguity was named by 2 of my other respondents as hallmarks of wisdom. This concurs with the finding of Sternberg (1990) that the wise individual will display a judicious character. Rather than sitting in judgement, the wise man or woman strives to understand the meaning of a situation in context. According to Jean, “a lack of wisdom would certainly be a refusal to see shades of gray, but rather seeing everything in black and white.” Echoing the same sentiment, Alan spoke of how the young are often dangerous in their certainty. “I don’t believe there’s no fool like an old fool,” he said. “You want to know really, there’s no fool like a young fool.”

Indicating how age had brought him to a point where he himself has lost the cocky self-assurance of his youth, he remarked, “Ask me any question you want, and I promise that I will not have the answer. I will have an answer, but I will not have the answer. I’m just not old enough yet. I haven’t learned enough.”

Perhaps the most telling answers in my interviews were derived from questions 11 and 12, which asked that respondents describe themselves in two future scenarios: one in which they were their idealized selves and one in which they were less than ideal. I asked
that each participant assume his or her health, both mental and physical, to be excellent. The responses I received allowed insight into what these men and women perceived to be an ideal old age. These questions were particularly valuable in deriving information on the implicit theories of wisdom held by my respondents. These implicit theories are the notions that have been developed not through formal study of the matter but rather by living in society and sharing meanings therein. As noted by Bluck and Glück (2005),

Wisdom is an abstract, highly valued, multidimensional human virtue. Thus, although psychologists, philosophers, linguists, and laypeople all have a rather similar core conception of wisdom, its meaning may also vary in important ways among different subgroups and across individuals. (p. 87)

Imagining their ideal and less than ideal older selves, my respondents frequently mentioned the wish to remain active and optimistic. According to Gloria, who hoped to continue traveling, “Well, I don’t want to be a complainer. And I just want to be active, be able to get active, and be happy and content.” Jean expressed the hope to have “energy” and “optimism.” Thompson, who was toying with the idea of returning to freelance journalism after over a decade of retirement, said, “The worst thing for me would be to have nothing to do.” Alan described his wish to fulfill an altruistic mission through teaching at the LRI: “I would like to enable the old with passion to achieve their goals.” Lisa, who at 71 was so busy that it took much negotiation to find a time when she would be available to meet for an interview, concurred. In her words,

Well I have a very good role model, actually. My father actually died only a few years ago when he was nearly 103. And he was a teacher and was then an actor
until he was about 95, so I have every hope that I will be doing what I'm doing now in 10 years....I find it hard to look ahead and see myself in any other way than in terms of somebody who is very active.

As regards the description of their less than ideal selves, 3 of my respondents expressed their desire not to become isolated, gloomy, and narrow-minded. Jean listed “pessimistic, judgemental, intolerant” as characteristics she hopes not to develop with advancing age. Leo and Lisa also made reference to the unbecoming level of self-involvement that can develop in those who are lonely and elderly. Lisa, referring again to her period of incapacitation, indicated that she had caught a glimpse of the old woman she does not want to become:

Somebody who is self-centered, and who doesn’t go out, is fearful. Somebody who doesn’t really have an interest in what’s going on in the world. And closed down, basically.

Leo, expressing the same sentiment, said,

I hope not to be a highly singular, lonely, opinionated, self-righteous—I meet so many when I travel. They are lonely people. They have been bereaved for a number of years. And all of a sudden, everything comes to mean Me, because no one else counts.

Bluma, whose attitudes and viewpoints often differed from those of other respondents, had a unique response to question 11. When asked to describe her less than ideal old age, she said, “I’d like to retain my intelligence and my sense of humour. Those are important to me. I don’t want to lose those.” When asked how she hoped to be in the
future, she was succinct. Her answer was simply, “Me.”

Analyzing the answers that I received from my respondents, I believe that their implicit theories of wisdom were arrived at through what Mezirow (1998, 2000) refers to as the act of objective reframing. In this type of critical reflection, one considers and evaluates the assumptions of others. It is my observation that respondents arrived at their definitions of wisdom by (a) thinking critically about the thoughts, words and deeds of others and (b) noting elements in which they appraised themselves to be superior. According to Erikson et al. (1986), this act of identifying oneself favourably through comparison with others is not unusual. In his study of older adults, he found that some informants had sustained their sense of self-worth by adopting a patronizing attitude toward others—especially other old people.

Bearing this in mind, I have observed that Gloria, who esteemed herself as a sophisticated traveller, spoke with disdain of a “stupid” woman she knew who had two professional degrees. Despite her academic credentials, the woman—in Gloria’s estimation—lacked the breadth of understanding afforded by venturing outside of one’s community. Drawing a comparison between this particular professional and the people encountered on her travels, Gloria remarked,

And the people that I meet on these trips—and most of them are travelers like myself— I have so much respect for. Because the one thing it’s doing is it’s changing them. They are wiser. And they feel the same way I feel myself.

That I am a better person because I’ve had this education.

Thompson, who apparently valued his membership in MENSA and who
understood wisdom as a complex cognitive process, was disdainful of students at the LRI. In his estimation, they lacked the ability to think logically. Lisa, reflecting her implicit theory of wisdom as the root of empathy, remarked on the fact that so many others in society appear to lack this attribute.

I’ve thought about this a lot, about why some people have this great need to help other people, and others are just so totally self-absorbed. Yeah, they’re not bad people, but they just can’t see beyond, they can’t see beyond the individual to the community….They can’t see beyond themselves.

Only 1 of my respondents expressed scepticism regarding the existence of wisdom. Bluma, in fact, discounted the idea of wisdom altogether. Repeatedly and adamantly she denied having acquired wisdom through the travails of her life. By her own admission, she had tried to forget the past and hoped to avoid what is referred to in transformative learning theory as critical self-reflection (Mezirow, 1998, 2000). Bluma insisted that self-preservation is her finest skill, and the blunting of negative emotions is her best quality. Asked to define wisdom, she replied,

I find the word “wisdom” very pretentious. It means somebody who’s a guru—who knows everything, has perfect judgement, and knows the right thing to do every time. Can advise other people. I can’t do any of that. I wouldn’t presume to advise anyone else.

Asked to name a better quality to possess than wisdom, Bluma replied, “I would say to be a survivor….To be resilient. To enjoy things. I am very pleased with myself at the moment…because I’m loved and appreciated, and because I have a lot of fun.”
Summary

Throughout this chapter, I have taken the results of my analysis and organized these under subheadings that capture my interpretation of meaning. Under Motivation for Attending an LRI, I have examined my own misconceptions regarding why the older adults were attending liberal arts courses late in life. Further, I have established those similarities in motivation of my subjects to those expressed by subjects in similar studies. Most noteworthy among the parallels discovered are the need for cognitive challenge and the desire to engage in discourse. Under Self-Directed Learning, I have examined the attitudes of my respondents toward personal study outside of the classroom. Unless the self-directed study was ultimately used to prepare lessons in the instruction of others, my respondents trivialized their learning within this context.

Gender-Based Differences in Late-Life Learning was an unanticipated area of exploration that presented itself through the differing attitudes toward education as expressed by male and female respondents. Here I discovered the reluctance of male students to identify themselves as learners despite their apparent educational gains. This suggested that unresolved issues of power and dominance recalled from earlier school incidents might be in the older adult male’s experience of learning.

The subheading Disorienting Dilemmas pertained to incidents causing my respondents to reflect on assumptions and perhaps acquire wisdom-related knowledge. This was particularly interesting, as the 2 men who had not engaged in continuing education until entering the LRI were the only respondents who identified late-life education as a disorienting dilemma. The next subheading, Interrupted Narratives, relates
to my confirmation of Cohen's (1996) finding that late-life education can help older adults undo negative images of themselves as learners. Two of my respondents—Leo and Gloria—described experiences that closely adhere to this theory. Other respondents demonstrated evidence that they had used learnings acquired through the LRI to reinterpret the meaning of certain key life events.

The section on Critical Reflection provided substantiation that respondents had, to greater and lesser degrees, engaged in the type of thinking that allowed them to change their habitual ways of thinking. The section that followed, Resisted Perspective Transformation, suggested itself to me as a subheading when I noted that some of my respondents were clinging to habits of mind or frames of reference they had apparently long since outgrown. The fiercest to resist change was Bluma, who attributed her happiness to (a) the obstinate refusal to engage in recollection and (b) the suppression of self-reflective thought.

In order to explain how my respondents appeared to have understood reality, I interpreted and organized their responses in terms of Meaning Perspectives. Under this subheading, I examined the various ways that they described their methods of learning, communicating, and attending to issues of self-esteem. The final subheading, Wisdom, was where I scrutinized definitions and attitudes of my respondents toward this category of experience. In particular, I attended to responses of my participants regarding their implicit theories of wisdom. In the process of doing this, I accessed explicit theories of wisdom to find correlation and divergence. Further, I was able to compare the idea of wisdom as expressed by my participants to the manner of experience described as
perspective transformation in transformative learning theory. The implications of these findings will be explored in Chapter Five.
Wisdom too often never comes, and so one ought not to reject it merely because it comes late.


This chapter is being written late in the year 2007. On a weekday afternoon in the autumn, I gaze out my office window and see healthy, vigorous men and women running, roller-blading, or riding mountain bikes. I cannot help but notice the white hair and the balding heads. What I am actually seeing is an unprecedented demographic trend. Retirees are everywhere—and clearly, old age is not what it used to be.

In the year 2010, the first wave of Canadian baby-boomers will celebrate their 65th birthdays. Upon reaching this age, many will choose to retire from work. Examining trends among those already aged 65 and older in both Canada and the U.S, it seems likely that some of these retirees will celebrate their freedom from paid employment by enrolling in institutes of higher education (Statistics Canada, 2004a; U.S. Department of Education, 2001). My research was devised with this group in mind. Despite our society’s advances in the recognition of human rights, ageist stereotypes flourish. Among these is the image of the older adult as forgetful, incurious, and out of touch with current events. As a result, education is generally considered a pursuit of negligible value when accessed by the older adult student. At best, it is seen as a harmless diversion; at worst, as a waste of public coffers on the entertainment of a nonproductive group. Sadly, the older adults themselves will often carelessly concur with this verdict. As a result, they
unwittingly reinforce what Cruikshank (2003) and others have noted to be the youth bias of Western culture.

It has been my objective throughout this study to reveal, in part, the meaning and merit of higher education in late life. As was the case over a year ago when I began my research, I maintain that it can only benefit society if older adults are encouraged to engage in higher order thinking within a formal classroom setting. In this chapter, I share what I have learned about wisdom and late-life learning so that in some small way I might contribute to what is an important and emergent dialogue.

Summary of the Study

My premise from the outset of this study has been that the experience of higher education for the older adult learner might be unique. Using this as the point of departure, my purpose has been to explore the role of wisdom in the experience of a group of retirees who had been or were engaged in courses at a southern Ontario Learning in Retirement Institute (LRI). My prevailing interest has been to determine the possible existence of a relationship between perspective transformation and the development of wisdom as a task late in the life course. Explicit theories of wisdom developed by selected philosophers, psychologists, and religious thinkers were compared to the implicit theories of wisdom that respondents expressed. Further comparisons were drawn between these implicit theories of wisdom and the act of perspective transformation in transformative learning.

This qualitative study involved 3 men and 4 women with an average age of 77. All had completed at least two courses at the same LRI. I conducted a series of

Resulting from my transcript analysis and interpretations were nine themes. Four of these emerged from patterns of response from my participants. These four explicit themes are:

1. self-directed learning,
2. gender based differences in late-life learning,
3. interrupted narratives, and
4. resisted perspective transformation.

Five of these themes were anticipated and developed directly from my theoretic grounding and my interview questions. These themes are:

1. motivations for attending an LRI,
2. disorienting dilemmas,
3. critical reflection,
4. meaning perspectives, and
5. wisdom.
Analysis of transcripts through the lens of theory found evidence that the development of wisdom compares favourably to perspective transformation. As is the case with perspective transformation, wisdom gains are realized through discourse and critical self-reflection on assumptions. Two of those 3 LRI students who also moderated courses indicated having had much experience with this type of learning. All 3 LRI instructors expressed deep satisfaction in having been able to put their learnings to use as teachers. I regard this act of taking acquired knowledge, skills and abilities and putting them to use as engagement or praxis. In using this latter term, I refer to Mezirow (1991), who provides the definition that “Action in transformation theory is not only behavior, the effect of a cause, but rather ‘praxis,’ the creative implementation of a purpose” (p. 12).

A recommendation evolving from this study is that opportunities for sharing the results of discourse within Learning in Retirement Institutes should be implemented by program administrators. In the absence of evaluation, other means of praxis, such as the generation of services, must be developed so that students can measure their success against objective criteria and hence attach meaning to their studies. My conclusion is that a model of productive aging needs to be consciously cultivated by those responsible for programs in LRIs. If they were to be given encouragement to act upon their learnings in the production of goods or services, paid or unpaid, the older adult learners would be empowered to define and develop new roles for themselves and their peers as vital members of society.
Discussion

I began my study with a number of suppositions related to the idea of the development of wisdom in older adults. In the course of conducting interviews, I made discoveries regarding the meaning and experience of late-life learning. Among these was the disconfirmation of one of my research questions. Contrary to my initial suspicions, the older adult learner does not in fact seem to anticipate the development of wisdom as a task late in the life course. Further, none of my respondents indicated a sense that he or she was performing a meaning-making exercise at the point of embarking upon studies. Indeed, the most commonly expressed motivator for attending classes at the LRI was the need for intellectual stimulation among like-minded individuals. I believe that my interview questions were exhaustive enough to have derived any hints had the educational endeavours of my participants been part of an age-related psycho-social task. If this were indeed a motivation, it was not one of which my respondents were conscious. Therefore, I found no clear support for my proposition that the older adult who enrols in a course of higher education has the tacit or explicit goal of becoming wise.

The lack of intent to acquire wisdom did not prevent my respondents from making wisdom gains. I have arrived at the intriguing conclusion that those LRI students who also serve as course moderators experience the most profound learning and most positive outcomes in terms of personal development. The act of planning, moderating, and participating in a lively discourse seems to have a catalytic effect upon the individual, whose learning is accelerated on both a cognitive and affective level. In this category I include the respondents referred to as Lisa, Leo, and Alan. These three had all
experienced what I identify as a perspective transformation since beginning their work as moderators. By their reports, this was an unanticipated outcome of late-life learning. Further, those respondents who do not moderate courses but who have used the LRI in the production of written material—the respondents I refer to as Thompson and Gloria—also reported cognitive and affective gains. However, in that these latter 2 respondents did not report changes in their behaviour as was the case with the three moderators, I rate their wisdom gains as being of less significance.

From the analysis of interview data, I conclude:

1. The older adult gains more if given the opportunity to use his or her learnings at the LRI in the production of a good or service (even when these are provided to others free of charge). For example, writing something for publication or providing one’s services as a classroom moderator were demonstrated to be highly satisfying uses of learning within my group of respondents.

2. The older adult who must be actively engaged in discourse in the classroom (i.e., the moderator) makes the greater wisdom gains. Those whose participation is optional (i.e., students) gain less.

3. Critical self-reflection, as stimulated through discourse, is of enormous value to the older adult in terms of facilitating the development of wisdom.

With respect to item 1 (above), I perceive that an issue of accountability is central to this result. Students at the LRI are accountable only to themselves in terms of the depth of learning acquired. The moderator, however, is inevitably held responsible for the quality of the classroom experience by all who attend. A dull course will reflect poorly on
the person who organized and presented the various modules. I am thinking here of Leo and Lisa and Alan, for whom the pressure to produce interesting classroom experiences was a vehicle for their own learning.

On a similar note, those who publish their writing offer the fruits of their intellectual labour for public scrutiny. Thompson and Gloria appear to have taken their research at the LRI quite seriously, knowing that their readers would ultimately judge their efforts. According to my respondents, the strain of having the depth of one’s learning tested in a public forum has been a tolerable experience. In fact, they were clearly proud of their learning and at peace with the fact that it had been accompanied by periods of distress. These attitudes contrast sharply with those of Jean and Bluma, who both regarded their studies as stimulating diversions which, however, held no real meaning beyond their usefulness in alleviating boredom.

What I extrapolate from this is that the absence of assessment is a deterrent to the quality of learning in the LRI. Ironically, it is also one of the attractions. Three of the responding students—among them Lisa, also a class moderator—specified that studying and the responsibility of doing class presentations was perceived to be undesirable and a source of stress. For these 3, the choice of attending the LRI rather than another institution was made with the intention of avoiding the pressure to perform, which they felt would detract from the pleasure of the learning experience. Lisa did not seem to note the dissonance between this expectation and her lived experience as a course moderator, where evaluation of her performance has, presumably, been ongoing. Nevertheless, during our interview, she announced her plans to enrol in a school where student
presentations and evaluations were required. In revealing this, she added the proviso that if the course places high cognitive demands upon her, “I might just drop out.”

Reflecting on the views expressed by my respondents, I discern that our society exempts and excuses the older adult from tasks that demand higher order thinking. In fact, I would venture to suggest that the older adult is gently dissuaded from this type of activity. The antagonists here are the institutionalization of retirement and a lack of public education on the health benefits of mental play. Together, these have caused us to adopt a limited and unimaginative understanding of leisure. Caro, Bass and Chen (1998) posit that institutional ageism is possibly to blame: a pervasive cultural understanding of what is appropriate and possible for those past the traditional age of retirement.

Challenging intellectual activities are unfairly considered to be exceptional when undertaken by those who are age 65 and older. Despite the benefits of mental challenge, such as heightened cognitive performance and self-esteem, it is an activity that naturally carries the risk of confusion and frustration. That this type of risk-taking should not be prescribed for the older adult seems contrary to good reason, since regular mental challenges can in fact be of benefit to the retention of strong cognitive performance and self-esteem (Moody, 1998). Further, encouragement for taking reasonable risks can be found in behavioural therapy, self-help literature, popular axioms, and countless contemporary advertising slogans (e.g., “Just Do It”).

Why intellectual risk-taking should not be prescribed for the older adult is an oddity of our society. One explanation might be that our so-called “social clock” (Helson, Mitchell, & Moane, 1984) was set in antiquity, when life expectancy was shorter and
when the possibilities available for the old were limited by pre-Industrial era
expectations. It makes no sense that this same timepiece should be considered a valid
instrument today. Nevertheless, I would argue that many senior citizens attend to this
clock and hence adopt the attitude of being intellectually risk averse. In fact, the
contemporary ideal of retirement in Western society appears to involve a retreat from the
type of thinking necessary for wisdom to develop.

Four of my respondents reported that participation in discussion groups at the LRI
had served as a springboard for wisdom gains. These gains, as discussed in Chapter Two,
are measured using the five criteria presented by Bluck and Glück (2005). They include
the development of fluid and crystallized intelligence, insight, a reflective attitude, a
concern for others, and real-world problem-solving skills. Alan and Lisa—both course
moderators—were foremost among my respondents to have benefited from this type of
learning. Both articulated their sense of having developed cognitive and affective skills
through the vehicle of classroom-based discussion. Their perceived gains substantiate the
findings of both the Berlin Wisdom Paradigm and the Dialogue Project (see Chapter
Two) regarding the benefits of discourse. Discourse includes discussion, but also social-
interactive and cultural products (Staudinger, 1996). From Mezirow’s (1991) standpoint,
discourse is a means to emancipatory learning, which can lead to perspective
transformation. According to Staudinger (1996) discourse is a means to the development
of wisdom.

I must indicate my sense that, based on the results of this study, the phenomenon
known as perspective transformation and the experience of making wisdom gains are
convergent. During the period when one is undergoing incremental changes of perspective, one is simultaneously making wisdom gains. These gains would be measured through increases in the clarity of self-awareness, the depth of self-reflection, and the transcendence of one's subjectivity and projections (Ardelt, 2000). Both perspective transformation and wisdom gains are understood as processes and as periods of change and acquisition. Transformed learning and wisdom are understood as conditions that result from the successful navigation of these processes. However, action and the implementation of newly acquired skills—also referred to as praxis or engagement—are required in order to arrive at this destination. I have presented this process in Figure 1.

In defining the idea of action in the model presented through Figure 1, I refer to the balance theory of wisdom (Sternberg & Lubart, 2001) which is based on tacit knowledge. Action, understood in this context, would be

The application of tacit knowledge toward the achievement of a common good through a balance among (a) intrapersonal, (b) interpersonal, and (c) extrapersonal interests to achieve a balance among (a) adaptation to existing environments, (b) shaping of existing environments, and (c) selection of new environments, over the long term as well as the short term. (p. 507).

Supporting this proposed relationship, I note that critical reflection was indicated throughout my research to have a positive relationship to wisdom gains. My respondents whose learnings compared favourably to explicit theories of wisdom were those who reported having engaged in what Mezirow (1998) refers to as CSRA: a challenging and
Figure 1. The evolution of wisdom and transformative learning through older adult education at an LRI.
potentially emancipatory type of thinking. Analyzing my interview transcripts, I discern that critical reflection not only provokes an emotional response but also requires that one examine the source and meaning of feelings. Those successful in this manoeuvre are rewarded with perspective transformation. Therefore, I conclude that the act of perspective transformation has a strong affective component. Although variations of this view find support from Sveinunggaard (1993) and others, it is not in keeping with Mezirow’s (1978) original model of transformative learning theory. In focusing on the rational aspects of perspective transformation, Mezirow has neglected to comment on the affective domain. This oversight has been critiqued by many, and from a number of perspectives (Taylor, 1998).

It is interesting to note that, just as transformative learning theory has come under criticism for its excessive emphasis on rational thought, so have wisdom theorists debated the relationship between cognition and affect in that phenomenon. Baltes, Smith, Staudinger, and Sowarka (1990) and also Moody (1983, as cited in Kramer, 1990) define practical (as opposed to theoretical) wisdom as the ability to solve problems with a level of objectivity, remaining detached from the immediate and interpersonal meaning of the situation. One’s emotional, feeling response is considered to be a less reliable means of arriving at a wise decision. On the other hand, theorists such as Brent and Watson (1980, as cited in Kramer, 1990) describe the wise as peaceful, gentle, empathetic, and concerned. Holliday and Chandler, in a similar frame of mind, argue for “a more modest or reduced role for cognitive factors in the definition of wisdom” (1986, p. 83). Clayton and Birren (1980), however, emphasize that cognition, affect, and reflection together are
the defining features of wisdom. Their approach is captured later in Sternberg’s (1998) balance theory, which posits the end result of a wise decision as being one that ultimately serves the common good.

Implicit theories of wisdom gathered by my respondents also reflect this diversity of opinion. In the interviews I carried out, it was interesting to note that all five of Bluck and Glück’s (2005) criteria of wisdom development were identified by my respondents when asked to define wisdom. However, not all of these themes were identified by all respondents. Alan’s and Lisa’s responses were such that I identify their implicit theories of wisdom as being most similar to Sternberg’s (1998) stance. Choosing from among all my respondents, their accounts of wisdom are the most credible, as they had apparently not only considered the problem but also had experienced the phenomenon through behavioural changes. It must be mentioned that both Lisa and Alan said that the wisdom gains in their lives occurred not as epochal events but rather incrementally: in their words, as a “progression” and as “something that just evolved.” Accepting, for the moment, that perspective transformation and wisdom acquisition are synonymous events, then credence is given to the view of transformative learning as something that takes place over time. In Lisa’s recounted life story, there had certainly been many incidents that might qualify as what Mezirow (1978, 1991) would refer to as disorienting dilemmas. Nevertheless, Lisa insisted that there had been no one event that caused her to change her worldview. Rather, the accumulation of experience, coupled with the discourse and critical reflection available through the LRI, seem to have allowed her both cognitive and affective growth. Alan, who was far more reticent on the topic of his
personal disappointments, nonetheless affirmed that experience was vital in the accretion of wisdom gains. He also referred to class discussion (discourse) at the LRI and the resulting introspection (critical self-reflection on assumptions) as being of the utmost significance in this regard.

Discourse on topics that caused my respondents to experience some degree of distress seemed to produce the most profound learning results. I think here specifically of Alan, whose classroom discussions on morality and ethics forced a radical reappraisal of his life. From this reappraisal came the conclusion that he had operated from a morally untenable position throughout his career. Moreover, he realized that he had successfully deluded himself regarding his role as an exemplary member of both his community and his profession. As a result, he concluded that he could not, in the future, adopt a position of certainty on any topic in any arena. Lisa, on a similar note, mentioned the evolution of her listening skills through discourse with classmates whose views on politics opposed hers. She acknowledged that the ability to suspend her judgment was gained with difficulty. It involved controlling her passionate emotional reactions, and preventing herself from making dismissive statements, or what Brookfield (1990) calls definitive summaries in response to what she considered to be outrageous remarks. The result, however, was that she had become more open-minded and hence disenamored with the steadfast convictions of her political friends.

Ambiguity—a trait of the wise, as identified by Takahashi and Bordia (2000)—appears to be a way of thinking with a strong affective component. Lisa and Alan, in developing this quality, had also learned to assess their feelings and to evaluate the role
of emotions in their various deliberations. That a tolerance for ambiguity was won through the act of critical self-reflection on assumptions is evident. Neuman (1996, as cited in Taylor, 1998), commenting on his 2-year longitudinal study of 9 participants, found that “perspective transformation included affective outcomes such as a greater appreciation for differences, tolerance for ambiguity and feelings for courage, self-trust and inner strength” (p. 463). These outcomes are similar to those findings of the Berlin Wisdom Paradigm, where people who score higher on wisdom-related performance appear to be open-minded, nonjudgmental, growth oriented, moral, and socially competent.

Wisdom, it would seem, is born with a host of desirable attributes. Critical self-reflection might be understood as the midwife. Yet, despite the enrichment that reflective thinking can offer, it is apparently something that must be won through effort and a certain degree of anguish. Both Alan and Lisa described their experience as moderators in the LRI as having caused intense introspection. As noted by Dewey (1910, p. 13),

Reflective thinking is always more or less troublesome because it involves overcoming the inertia that inclines one to accept suggestions at their face value; it involves willingness to endure a condition of mental unrest and disturbance. Reflective thinking, in short, means judgment suspended during further inquiry.

Retirement in our society is considered to be a time when one has won the right to abandon those survival-oriented activities that have caused mental as well as physical strain. Nevertheless, I would argue that reflective thinking is a privilege of being human. To consider a portion of our society to be past the point where they should perform this
type of activity seems both denigrating and discriminatory. The stereotype of the elderly as hopelessly confused has become prevalent in our society (Dixon, 2000; McGuire, Klein and Couper, 2005). As a result, we are often surprised to meet a much older person who is alert, intelligent and involved.

Of course, it is within the older adult’s rights to reject arduous mental work. Even those who take courses in which higher order thinking is encouraged can ignore the call to participate in critical self-reflection. Alan, referring to his own life before attending the LRI, said, “Some of us just don’t think. You can live very well not thinking!” I would refine his statement by saying that in fact some learners choose not to or cannot think in a manner that will promote transformative learning and/or the development of wisdom. The level of self-scrutiny, objectivity, and honesty required is simply beyond the capacity of some. Also, there are undoubtedly those who abandon reflective thinking soon after it has begun. Reflective thinking is not only difficult, but it can also be terribly inconvenient. For example, the reflective thinker might, in his or her newfound wisdom, be required to make wide-ranging changes to behaviour. That Alan was unable to think deeply about morality and ethics before his retirement comes as no surprise, as this would have forced a complete revision of the way that he made a living. Bluma, the well-educated respondent who fiercely resisted critical self-reflection, was likely engaging in the safest form of behaviour she could in the interest of self-preservation. The comfortable life she had built for herself might certainly need an overhaul were she to seriously question her choices and her assumptions. Further, as Bluma herself attested, the process threatened to unleash a cascade of painful memories that she preferred to contain.
Of all my respondents I believe that Bluma was most instructive to me as regards the development of wisdom. If anything, she served as a negative or deviant case. Although equipped with intellectual ability, drive, energy, and good health, she nonetheless was unwilling to engage in the critical self-reflection needed to inspire the development of wisdom and/or a perspective transformation. Dismissive of wisdom altogether, she counted her ability to thrive, to take care of her needs, and to have fun as her virtues. Her unrepentant self-involvement and hedonism were diametric opposites of those characteristics that Kunzmann and Baltes (2005) associate with wisdom. According to their study, people who score high in wisdom-related knowledge report that they value nurturance of the common good and are generally disinterested in seeking a comfortable or pleasurable life. In her failure to demonstrate these qualities, Bluma was a fascinating respondent. She spoke with certainty about her unwillingness to engage in reflective thinking. From her point of view, it would be a depressing activity without tangible reward. As is the case with those who receive low scores in the Berlin Wisdom Paradigm (Staudinger, Smith, & Baltes, 1994), Bluma expressed a preference for self-centered pleasant feelings such as happiness and amusement rather than environment-centered positive emotions such as inspiration and an interest in helping others.

Considering Bluma as a negative case in my quest for examples of wise conduct, it seems evident that wisdom is demonstrated by behaviours commonly considered to be among the highest human virtues. Further, in order for wisdom to fully develop, I conclude that the following conditions must be present:

1. One must be open to the idea that a higher state of understanding such as wisdom
can be achieved.

2. One must be willing to engage in thorough critical self-reflection on assumptions.

3. One must have access to ongoing and provocative discourse on a variety of topics.

4. One must be willing and able to interact with others on a regular basis in the production of a good or service which allows his or her higher state of understanding to find praxis.

These conditions have evolved from analysis of interviews with my LRI respondents, and especially of interviews with those who seem to have developed some degree of wisdom. I attribute much importance to the fourth of these conditions, as it runs contrary to our society’s tacit acceptance of passivity and self-indulgence as synonyms for retirement. A lifestyle in which opportunities for making contributions toward society are minimized, and in which the necessity of one’s existence is diminished, is not one in which wisdom is likely to develop. The most significant finding in this study, I believe, is that the potentially wise need outward expression if their higher understanding is to fully develop. Those of my respondents who sought ways in which to enrich the lives of those around them apparently made the greatest gains as regards behaviours and attitudes that compare favourably to explicit theories of wisdom. Alan, discussing his mission as moderator of a course on ethics and morality, claimed that he felt responsible to motivate others to adopt higher standards of behaviour. For him, teaching had become the outward expression of wisdom. Lisa, who also developed and expressed her wisdom through teaching, had gone even further by founding a nonprofit society. In her good works and through the tangible results—in her case, the feeding and clothing of the poor—wisdom had
evolved from theory into practice. Personally, I find it hard to imagine a more satisfying way of using one’s education or of making meaning late in life than through acts of altruism. Hence, I conclude that although one might have the capacity for wisdom, it cannot be considered to exist except through action. This differs somewhat from the definition of Baltes and Staudinger, who define wisdom as expertise in the conduct and meaning of life (2000). My understanding aligns more closely to Sternberg’s balance theory of wisdom, which posits that people are wise to the extent that they use their intelligence to seek a common good (Sternberg, 1998).

Implications for Practice

Among the wisdom criteria identified by Bluck and Glück (2005), I identify real-world problem-solving skills as being of the utmost importance. I interpret this to mean that one’s wisdom must be demonstrated through action. Bassett (2005) has arrived at a similar conclusion, as witnessed in her model of Emergent Wisdom, which indicates Engaging, or involvement, as a principal dimension of wisdom acquisition. Based on my interviews, I conclude that those who simply participate in discourse and critical self-reflection will fail to learn at the same level as those who realize the production of a good or service as the direct result of their learning. Couching this in the vernacular of educational gerontology, I believe that the older adult will learn best and will find more meaning in late life if he or she maximizes potential through a conscious effort to engage in productive aging. However, I recognize that the acceptance of this model would require public education. The view of old age and retirement as a time of passivity and disengagement is entrenched in our society, even though advances in health care have
caused chronological age to lose much of its predictive value.

In 1983, Canada's National Advisory Council on Aging noted that "the ability of elderly people to learn and to teach is routinely under-estimated and under-used" (NACA, as cited in Thornton, 1992, p. 33). Over 20 years later, this lack of appreciation for the educational capabilities of the old continues. In 2005, the Adult Education Review published by the Ontario Ministry of Training, Colleges and Universities reported on seniors in vague and predictable terms, acknowledging the need for affordable general interest courses to appease this portion of the population. It is my opinion that those civil servants responsible for spearheading programs on behalf of the old are not the best administrators of such initiatives. I suggest that older adults need to appoint themselves as guardians of this interest. There is much need for the wise at the grassroots level, in committees, advisory councils, and advocacy groups that devise and direct the future of older adult education. Moreover, the old themselves need to decide not only what they want to learn but also the demonstrable outcomes that they wish from these learnings.

To this end, I believe that those moderators culled from the student body at the LRI where I did my research should receive some basic instruction on the principles of adult education. Currently, this is not available. At the very least, the moderators should be asked to develop learning objectives for the courses they teach. In the absence of evaluation, this method of accountability would likely aid in the student's perception of him or herself as performing a learning task attached to purposes and expectations. Further to this cause, I suggest that moderators of LRI courses ask their learners at the outset of each course to compose statements of personal learning goals. Lacking this
written commitment, it is easy for the LRI students to excuse themselves from making the type of mental effort from which effective discourse and hence learning might result.

Based on my findings, I believe that it is possible to devise LRI courses with the explicit outcome that learners should experience wisdom gains. Certainly, this outcome could also be applied to courses of study for older adult learners at other institutes. Although fomenting wisdom might seem rather ambitious as the purpose behind a lesson plan, I propose that it could be achieved through the implementation of some familiar learning activities. Discourse, a variety of challenging readings, journaling, and co-op/volunteer placements occur to me as strategies that would offer the most potential for success. Teaching for transformation, which we readily offer to those in youth and middle age, must not be denied to our elders.

Other recommendations linked to my findings relate to how a future study or studies on the subject of wisdom and perspective transformation might best be designed. First is the notion that one could take a hermeneutic phenomenological approach. Specifically, the patterns and themes that arose from the coding of transcripts could be presented to the participants for consideration. The rationale for using this methodology would be to elicit richer responses and in so doing discover how the respondents interpreted their lived experiences. Another possible avenue of exploration would be to interview 7 older adults who had not participated in late-life education. The purpose of this approach would be to compare the responses of a population disengaged from academic learning to see how they understood the experiences identified as wisdom and perspective transformation.
As noted earlier, 6 of my respondents had become involved in late-life learning with the intention of enhancing old age. Only one of my respondents said that she had returned to school in the interest of keeping her mind young. As regards future studies, it occurs to me that a probing, critical set of questions regarding the motivation for attending school could be presented to a focus group composed of older adults engaged in late-life learning. Given the aforementioned usefulness of discourse, I believe that dialogue on the meaning of older adult learning among the older adults themselves would provide richer findings than those that a relative youth such as I can provide. At present, I am 28 years younger than the average age of my respondents. My interpretation is impaired by my age, by my inexperience, and by my own deficit of wisdom.

Limitations

In the analysis and composition of this thesis—and especially as I restrained myself from examining my material through theoretic lenses I had not prepared in advance—I became acutely aware of the limitations of my study. My interpretation is the result of my culture, my theoretic grounding, and my own constructed meanings. I would suggest that different results might arise were an identical study to be conducted by someone living in an Asian society, where noncognitive domains of wisdom are more often embraced (Takahashi & Overton, 2005). Further, given a larger sample—especially if men and women from many LRI s were included—more patterns of experience might have been found.

The intrinsic value of late-life education, I suspect, would have been awarded higher merit by my respondents had they been attending a school where grades and
diplomas resulted from study. Apparently, the lack of external evaluation and lack of formal recognition of acquired learning had an effect on how they perceived the meaning of their late-life education. Another source of varying results might be found had only those who had no previous experience in adult education prior to entering the LRI been included in interviews. Undoubtedly, the return to a classroom after a long absence was a major factor in creating an environment for wisdom acquisition and/or perspective transformation. That all but 2 of my respondents had a history of continuing education resulted in few disorienting dilemmas upon enrolment in the LRI.

Another limitation is the problem that the men and women in my study were above age 65, which Erikson specified as being the start of old age. They were also well above age 55, which I had indicated as the low end of the age demographic I would consider as my target group of retirees. The ages of my respondents are significant in that they are all well into what Erikson in 1982 considered to be the final stage of psycho-social development. In fact, Erikson himself lived until age 91, which gave him time to reflect on his initial stage theory and hypothesize the existence of a ninth stage beginning at age 80 (Erikson & Erikson, 1997). Two of my respondents had already entered this posited stage, and three others were not far behind.

A key feature of Erikson’s ninth stage of psycho-social development is the struggle to achieve wisdom through life review. In this act, the older adult will attempt to integrate various episodes of his or her past into a coherent, integrated whole (Erikson, 1997). The limitation caused by the high ages of my respondents is that they may indeed belong to a discrete group upon which little research has previously been conducted. A
recommendation for future research includes comparing learners within this age group against those between ages 65 and 80.

Overall, I believe that the greatest impairment to my study was the fact that its scope was limited to students at one LRI. Although pleased with the recommendations that have evolved, I am also cognizant that a greater range of responses would likely have resulted from speaking with older adult students in a variety of learning institutions. In particular, I now recognize the potential for richer responses had I spoken only to older adults who were embracing elements of a lifestyle that has been termed productive aging. However, now that I have identified a relationship between wisdom and useful activity, future researchers with an interest in wisdom acquisition might specifically seek those older adults for whom learning as well as continued participation in society are characteristic. I see this finding as a contribution to wisdom theory and also to the practice of teaching older adults in institutes of higher learning.

**Conclusion**

From this study I have arrived at the conclusion that the learning experience of older adults can be qualitatively unique. This quality is the result of the passage of time and one’s willingness to reflect. Whether or not this unique type of learning is experienced, however, is largely a matter of one’s personality. As noted by Moody (1998), meaning in old age can be found through either a continuation of values that were important to early life, or through the development of new meanings, which are derived from new points of view.

I contend that those older adults who have the capacity to engage in effective
discourse and critical self-reflection will have access to this second type of meaning and learning. In fact, what Moody (1998) describes when he refers to the development of new points of view is a meaning-making exercise or learning event. I find no reason to believe that this experience is any different from what has been described by Mezirow (1978, 1991) and others as a perspective transformation. I would further suggest that openness to new meanings and points of view is essential to the development of wisdom.

Based on responses from my informants, I understand that accumulated learnings from experience are essential for the development of wisdom. As a result, the phenomenon of being wise would be difficult for a younger person to achieve. Those who succeed would need to be savants in both affect and perception. My respondents who described the development of attitudes and behaviours reflecting wisdom gains were those who, in addition to being able and willing to recall a long lifetime of personal experiences, also demonstrated the willingness to engage in reflective thinking, effective discourse, and a problem-posing approach to uncertainty. Therefore, I would suggest that wisdom is a manner of thinking facilitated not only by a wide knowledge base but also by the characteristics of empathic listening, curiosity, flexibility, and wit. I have chosen the word wit carefully here, as I believe that it best reflects the love of play that the wise mind exhibits. And from this wit proceeds a continued engagement and interest in life: a state that Erikson et al. (1986) refer to as “vital involvement” in old age (p. 51). That vital elders are not cultivated in our society with the same vigour in which we cultivate vitality in younger men and women strikes me as being more than an oversight. It is the result of discrimination, and it is disgraceful.
"That is no country for old men." So laments William Butler Yeats, whose "Sailing to Byzantium" (Yeats, Finneran & Harper, 1989, p. 197), written in 1927, articulated his yearning for a place where the "monuments of unageing intellect" are honoured. Although 80 years have passed since Yeats wrote this poem, today's older adults might certainly feel moved to express a similar sentiment. In contemporary Canadian society, aging is regarded by many as a pitiful state—an invitation for ridicule, and the fulcrum upon which the negation of one's usefulness to society is understood to turn. Our fixation upon loss and decline as characteristics of old age has caused what I perceive to be an inhumane climate for aging. It is no surprise, then, that older adult learning should be widely regarded as superfluous. Until we can attach meaning to the practice of erudition among the elders of our community, it will continue to be considered as yet another expression of the so-called "busy ethic" promoted among senior citizens. This ethic, as described by Ekerdt (2000), seems to have been adopted with the goal of legitimizing retirement in a society where work and activity are accorded the highest esteem. The continued busyness of those seniors who ascribe to this ethic, however, is usually considered to be an end and meaning in itself.

I propose that the education of older adults needs to have a purpose beyond satisfying the need to look and to act busy. The sense of agency we urge our young to realize as they embark upon their careers should also be promoted as an outcome of older adult education. Objectives such as service, mission, and personal discovery should not be out of place among the community of older adult learners. Indeed, Erikson et al. (1986) indicate that the expression of this generative function among the old is a
continuation of healthy psycho-social development. Bequeathing one’s wisdom to younger generations is, in Erikson’s epigenetic life scheme, presented as the safeguard of the elderly against despair. The strength embodied in this function is understood as integrity. It is a simple and timeless notion. Integrity, as an essential element in the acquisition of wisdom, is in my mind a disposition that must be cultivated in order to meet the demands of a country that is rapidly populating with old men and women. I call upon the wise, and also upon those who hope to become wiser, to work toward developing a climate where wisdom is valued and promoted within the sphere of late-life education.
References


ground. In J. Mezirow (Ed.), *Learning as transformation: Critical perspectives on a

Yeats, W. B., Finneran, R. J., & Harper, G. M. (1989). *The collected works of W.B.*

Appendix A

Eligibility Survey by E-mail

Survey Participant # ______
(to be assigned by researcher)

Please answer the following questions. These will be used to determine your appropriateness for my proposed interview regarding participation in lifelong learning. This information will not be associated with your name. Within two weeks of returning this document, you will be advised of your status in the study.

1. Your age when you began your current program of studies.
   55 - 60  61-65  66-70  71-75  76 - 80  80 +  

2. Have you completed two or more courses at a Learning in Retirement Institute? Yes  No

3. Please list the names of some of the courses you have taken to date.

4. Your gender. M  F

5. In the interest of interviewing some participants who were born and raised in a different culture, I ask that you indicate whether or not you identify as an immigrant. Yes  No

6. Are you currently employed in some capacity? (You receive payment for regular services). Yes  No

If YES, proceed to question 7. If NO, proceed to question 8.

7. Do you have plans to retire within the next year? Yes  No

8. Are you seeking or planning to seek employment within the next year? Yes  No

Thank you for taking the time to respond. Please return this survey to:
Iffarquhar@jhshamilton.on.ca
Appendix B

Participation Eligibility Key

*Survey Participant # ________
(to be assigned by researcher)*

<table>
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<th>Check one:</th>
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<th>Employed</th>
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<tr>
<td>1) Is between 55 – 65 years of age</td>
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<td>0</td>
</tr>
<tr>
<td>2) Is 66 or older</td>
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<td>0</td>
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<tr>
<td>3) Has completed two or more courses</td>
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<td>0</td>
</tr>
<tr>
<td>4) Has completed 3 or more courses</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>5) At least two courses are not hobbyist or leisure-oriented</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>6) Male</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>7) Immigrant, born outside of Canada</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>8) Retired</td>
<td>1</td>
<td>0</td>
</tr>
</tbody>
</table>

*(If retired, skip to question 10)*

| 9) Planning to retire within next year | 1            | 0        |
| 10) Not seeking employment            | 1            | 0        |

Total  ____
Appendix C

Interview Questions

1) Please tell me a about yourself (Probe for details concerning the participant's circumstances, such as family and previous education.)

2) Beyond the courses that you take at (name of LRI) what other things do you do for intellectual stimulation? (Probe for reading material, etc.)

3) Please describe other forms of professional development or education that you have been involved in (Probe for courses taken at work or through community involvement).

4) When did you start attending classes at (name of LRI)?

5) Please think back to when you started at (name of LRI). Do you recall if there was an event that prompted you to take this step?

6) Please describe what you consider to be the most significant things you've learned in your recent studies. (Probe for more detail if the respondent only provides facts or procedures memorized from courses).

7) Thinking outside of the classroom, could you please describe a time of rich learning – learning not necessarily from books and study, but from life experience?

8) I want to talk now a little about the idea of wisdom. Please describe what you consider wisdom to be. (Probe for information regarding the affective and cognitive evidence of wisdom, and how these are acquired).

9) As you look back on your life, please describe a time when you believe wisdom began to develop.

10) Please describe what you would consider to be the opposite of wisdom. (Probe for the respondent’s description of how one might think or behave when unwise).

11) I want you to imagine yourself when you are older – let’s say ten or twenty years from now. Let’s suppose that your physical and mental health are both very good. Describe yourself as you hope to be – your ideal self.
   i. Describe how you hope to be intellectually.
   ii. Describe how you hope to be emotionally.
12) Now describe yourself as you hope not to be in ten or twenty years from now, again assuming that your physical and mental health are both robust.

   iii. Describe how you hope not to be intellectually.

   iv. Describe how you hope not to be emotionally.

13) Please describe how your involvement in the (name of LRI) might play a role in helping you to become your ideal self in the future.

14) Describe how the lives of others could be different through involvement with (name of LRI).
## Appendix D

### Coding Scheme

<table>
<thead>
<tr>
<th>Predetermined themes and codes</th>
<th>Patterns</th>
<th>Emergent themes and codes</th>
</tr>
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</table>
| Educational Gerontology: EDG  | • Hungry for knowledge  
• Lifelong learners  
• Discussion/discourse | Self-directed learning: SDL |
| Motivations for attending LRI: MOT | • Intellectual stimulation  
• Retirement: freedom (6)  
• Retirement: crisis (1)  
• Writing and research  
• Moderating, lecturing  
• Men downplaying their role as learners  
(Bluma: learning all technical) | Gender differences regarding LRI: GEN |
| Perspective Transformation: TRAN | • Disorienting dilemma  
\textit{Before retirement}  
\textit{Retirement}  
\textit{During LRI} | Resisted Perspective Transformation: RES |
| Disorienting Dilemmas: DD | • Critical Incident  
• Reflection/life review  
• Assumption questioning | Interrupted narrative: NARR |
| Critical Reflection: CRIT | • Travel  
• Role play in class  
• Transmission in learning  
• Discourse/discussion  
• Resistance to change  
• Going back to school as unfinished business  
(Bluma: resisting reflection) | |
| Meaning Perspectives: MEA | • Affect/emotions  
• Experience/Aging  
• Formal education | |
| Evidence of wisdom: WISEV | • Communication  
• Compassion  
• Practical knowledge  
• Evidence of wisdom  
• Definition of wisdom  
• Active in old age  
• Keeping an open mind  
• Sense of humour  
• Altruism  
(Bluma: denies wisdom) | |
The Brock University Research Ethics Board has reviewed the above research proposal.

DECISION: Accepted as Clarified

This project has received ethics clearance for the period of August 2, 2007 to December 31, 2007 subject to full REB ratification at the Research Ethics Board’s next scheduled meeting. The clearance period may be extended upon request. The study may now proceed.

Please note that the Research Ethics Board (REB) requires that you adhere to the protocol as last reviewed and cleared by the REB. During the course of research no deviations from, or changes to, the protocol, recruitment, or consent form may be initiated without prior written clearance from the REB. The Board must provide clearance for any modifications before they can be implemented. If you wish to modify your research project, please refer to http://www.brocku.ca/researchservices/forms to complete the appropriate form Revision or Modification to an Ongoing Application.

Adverse or unexpected events must be reported to the REB as soon as possible with an indication of how these events affect, in the view of the Principal Investigator, the safety of the participants and the continuation of the protocol.

If research participants are in the care of a health facility, at a school, or other institution or community organization, it is the responsibility of the Principal Investigator to ensure that the ethical guidelines and clearance of those facilities or institutions are obtained and filed with the REB prior to the initiation of any research protocols.

The Tri-Council Policy Statement requires that ongoing research be monitored. A Final Report is required for all projects upon completion of the project. Researchers with projects lasting more than one year are required to submit a Continuing Review Report annually. The Office of Research Services will contact you when this form Continuing Review/Final Report is required.

Please quote your REB file number on all future correspondence.