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Lifelong Learning: The Integration of Experiential Learning,
Quality of Life Work in Communities, and Higher Education

By

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Dissertation Submitted
in
Partial Fulfillment of the Requirements

for the Degree of

Doctor of Education

The University of Montana

Spring 2007

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ABSTRACT

Harwood, Ann. Ed.D., Spring 2007

Educational Leadership

Lifelong Learning: The Integration of Experiential Learning, Quality of Life Work in Communities and The Role of Higher Education

Committee Chair: Roberta D. Evans, Ed.D.

This descriptive quantitative study examined preferences and choices by adult learners (leading edge baby boomers and older adults, ages 50-70), who were participants in Elderhostel international experiential programs and The University of Montana Alumni Association educational travel programs. The study investigated the preferences of the sample populations and their interests in making a career change in mid-life to work in a new career to help improve the quality of life in their community. The typologies of the respondents were compared with their interests to make career transitions to jobs to improve the quality of life in their communities. The study investigated the willingness of respondents to participate in training, certification and/or university degree bearing studies in social responsibility disciplines, including human services, education, environment, arts and culture management, and nonprofit community leadership.

The research reported data in the following major categories: (a) reasons for participation in educational travel programs; (b) typologies of participants; (c) career choices; (d) jobs to improve quality of life in community; (e) university or lifelong learning institute training to work in human service work; (f) willingness to change careers to human services; (g) pay tuition for university classes for career transition to human service, education and community leadership positions, and (h) tax credit to spend a year in training to work in public service. Experiential learning, social responsibility disciplines, and making the transition to a new career that focus on the public good are displayed in the tables, figures and descriptions of the research of this study. The correlation of respondents' typologies with their interest to pursue a higher degree in a social responsibility discipline in higher education and experiential learning provided significant findings in this research. The conclusions of this study were:

1. The respondents displayed a willingness to change to a career in social responsibility disciplines, primarily in arts and culture management; human services helping the elderly, the sick and the poor, and civic group leadership; and tutoring and teaching in after-school programs or Sunday school.
2. There is a positive association between the typologies of geographical explorer, adventurer, activity-oriented, and service learning, and the intrinsic rewards to adult learners and their interest in higher education degree programs.
3. There is potential for higher education to attract a percentage of adult learners who want to pursue expanded higher education learning opportunities in social responsibility disciplines. The financial incentives are potentially lucrative for higher education to expand courses that create streams of revenue in the adult learner segments.
4. The respondents of both sample populations overwhelmingly want tax credits to train and work for the public good.

DEDICATION

To Ashley Elisabeth Maynard, PhD,

Precious daughter, inspirational young woman, you are a bright academic light and leader in the world, great teacher and leader in human values and developmental psychology who makes a difference in the quality of lives and education of children throughout the world.

To my parents, Kitty Patterson Harwood and William W. Harwood (in memoriam),

Your love and inspiration supported me in positive ways to be a curious lifelong student of books and life, and instilled responsibility, honesty and integrity in me as keys to success. You taught me how to age gracefully and gratefully with dignity.

To Great Bear,

Mentor, teacher, and best friend, you are the embodiment of true courage, honesty and integrity, and inspiration to me and many others to achieve a holistically balanced life in body, mind and spirit.

“It is surely not difficult to see that our time is a time of birth and transition to a new period. The spirit has broken with what was hitherto the world of its existence and imagination and is about to submerge all this in the past. It is at work giving itself a new form. To be sure, the spirit is never at rest but always engaged in ever progressing motion.

The spirit that educates itself matures low and quietly toward the new form, dissolving one particle of the edifice of its previous world after the other. This gradual crumbling is interrupted by the break of day that, like lightning, all at once reveals the edifice of the new world.”

- Hegel, The Phenomenology of Spirit, 1807

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My heart is also full of gratitude for my dissertation committee: Dr. David Strobel, Dean of the Graduate School, for his mentoring, ideas and discussions about the potential paradigm shift in higher education to include more Baby Boomers and older adults in degree-seeking programs to make career shifts in the second chapter of life. I also thank Dr. David Aronofsky for inspiring me to pursue research in lifelong learning and his positive mentorship for my own career changes. Thank you to Dr. Don Robson for his leadership and process, positive support and his educational leadership expertise; and Dr. Francee O’Reilly, a true role model and leader in higher education and in-depth expertise on APA dissertation guidelines.

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CHAPTER ONE

INTRODUCTION

*The world in which we are born is not the world in which we live,
nor is that the world in which we will die.*
-Margaret Mead

The challenges of the 21st Century for creating new paradigms for success in higher education institutions may offer heightened opportunities for higher education to grow and evolve in new ways that meet the needs of all students, both young and old. The era of the lifelong learner, the Ageless Learner (Conner, 2004), is knocking loudly at the doors of the Ivory Tower of higher education and learning. The demand for continued education in midlife and the later years will grow dramatically over the coming decades (Manheimer, 2002). Institutions of higher education are in a prime position to be creative leaders in the ever-expanding world of new learning, knowledge and community building. According to researchers for the American Association of Retired Persons (AARP 1994), the future well-being and quality of life in an aging society will depend in large part on new thinking and initiatives that promote education in its broadest forms.

The Council of Graduate Schools (2004) reported that higher education is facing changes in student demographics and demand, with particular trends towards increased number and participation rates of an age spectrum of students and increased ethnic diversity among students. Rapid changes are prevalent in every part of society and especially in higher education. The environmental scan of the Tulane University Strategic Plan (1998) reported that external pressures and tight budget constraints are pushing colleges and universities into making changes, and adapting their missions and programs. The 20th Century ended on an uncertain note for higher education, with

diminishing state investment, growing criticism of management approaches and high tuition costs, escalating regulatory burdens, and demands for new measures and methods of accountability (Ward, 2004). Trends in the aging population are already affecting different segments of society, as well.

The 21st Century has already experienced a significant population shift in aging, as the majority of adults in the U.S. are now over forty years old (Wolfe, 2003). The impact of the sheer numbers of adults who are classified as Baby Boomers can positively affect the different roles of higher education. According to Sharpe (2005), the literature differentiates among four generations: the Great Generation, Baby Boomers, Generation X, and the Net (also called Millennial) Generation. There are broad differences in values and expectations of each group.

Wolfe (2003) reported that the Baby Boomers, a dominant social force of over 77 million people and twenty six percent (26%) of the population, control an aggregate income of \$4.1 trillion. The Boomers are an older, healthier, better-educated and more financially secure group of people as they enter retirement and pre-retirement years. The aging American population is moving into the traditional years of retirement in the next few years, as the first wave of Boomers turns 65 years old.

Increased longevity during the last century means that people are living longer healthier lives, and have more time in retirement to engage in activities personally satisfying and likely to increase their quality of life (Manheimer, 2002). Boomers are attentive to their holistic health needs from physical, mental and brain health to financial, emotional, and spiritual health. This population of people represents opportunities and challenges for academic, nonprofit, private and governmental organizations which wish

to develop innovative and responsive programs designed to meet the needs of today's older adults.

The aging or "graying" of American society is one of the more significant external factors that can affect higher education (Martin, 1997). Older adults are the fastest growing age group of the American population who can create new learning constituencies and different models for participation in higher education. According to the National Household Education Surveys, during the 1990s, the percentage of people in the United States ages 66-74 who took at least one adult education class in the previous year more than doubled from eight point four percent (8.4%) in 1991 to nineteen point nine percent (19.9%) in 1999. The biggest growth in participation of individuals ages 55-74 was in community-provided, non-formal education (Manheimer, 2002).

The potential for the millions of Baby Boomers to participate in different roles as students and peer teachers in higher education and lifelong learning institutes is also emerging as this group enters retirement. University of Michigan emeritus professor of architecture, Leon Pastalan (2004), wrote about this trend in *University-Linked Retirement Communities*. More adult learners may head back to campus in order to update skills and live near the campus of their earlier educational experiences. Lifelong learning institutes are frequently established at the university-linked retirement communities (Elderhostel, 2004).

In addition, University of Southern Alabama professor Konrad Kressley asserted that university residential facilities appear to be well suited to the needs of aging baby boomers. An increasing number of institutions now offer retirement facilities on campus

to retired graduates (Kressley, 2002). University of Arizona President-Emeritus Henry Koffler promoted the concept of the Academy Village for retired scholars, scientists, business executives, writers, and artists in 24 cities (Dallas Morning News, 1998). Koffler's vision led to the development of the Academy Village linked to the University of Arizona near Tucson, Arizona. The University of Florida Foundation vice president Leslie Bram talked about building Oak Hammock, a 256-unit community. According to Bram, the goal was to create something new with the \$125 million facility, which has its own dean of residents to help people who move there to stay mentally and physically fit. This trend is part of the changing attitude toward aging that can help maintain and provide leadership in raising the level of standards in the quality of scholarship in higher education.

The value of providing opportunities to people who want to remain engaged intellectually and socially has also increased the significance of the volunteerism of millions of retired people (AARP, 2003). As more middle-aged and older people become interested in engaging in meaningful volunteer service and some people combining this with making an inner journey of spiritual discovery, interest in "conscious aging" has grown (Moody, 2002). According to Porter and Poulsen (1989), service combined with learning adds value to each and transforms both.

Boomers offer a great pool of potential for volunteerism in the context of service learning. As defined by Ehrlich (1996), service learning is the various pedagogies that link community service and academic study so that each strengthens the other. America has a tradition of voluntary service that supports an increasing number of senior adults to

take leadership roles in older learner programs (Manheimer, 2002) in this third stage of life.

The third stage of life, or Troisieme Age of human development, is a time when we can give back to society the lessons, the wisdom and resources that we have derived through our long and productive lives. This Troisieme Age is a special period when we can deepen our wisdom and personal sense of spiritual identity.

Whatever emphasis each one of us might place on this stage of life, our full engagement implies an enhancement of the common good. (Hadley, 1998, p. 42)

Experiential learning has long been a viable means of enhancing this common good, serving as what Kolb (1984) referred to as the philosophical antecedent and academic parent of service learning. As in all types of experiential learning such as cooperative education, internships, and field placements, service learning directly engages the learner in the phenomena being studied with the hope that richer learning will result (Kolb, 1984).

The critical difference and distinguishing characteristic of service learning are the two-fold emphasis on both enriching student learning and revitalizing the community. According to Vernon (2001), students involved in service learning typically volunteer with nonprofit community organizations to help address identified community needs in areas such as poverty, illiteracy, and environmental degradation. Service learning students' volunteer work is directly connected to course curriculum and intertwined with academic learning, in contrast to students who are volunteering with organizations as an extra-curricular activity.

Service learning programs are emerging in the U.S. in university alumni associations, government sponsored programs, nonprofits, and educational travel programs. The potential for the burgeoning population of Boomers to do social responsibility work in communities where they live or across the globe is fertile with possibilities. The study of older adults in service learning integrated with educational travel programs could reveal some factors that can be applied in programs of service learning in higher education institutions. Combining traveling with education and service work may be a good link for creating new higher education programs.

As Boomers retire from their present careers, they may tire of some of the traditional retirement activities such as playing golf, bridge and bingo. The Boomer may seek the inclusion of fulfilling life with learning, meaning and purpose through higher education. Higher education institutions could increase their role in meeting the intrinsic needs of older adults through educational programs for credit or merely for the joy of learning. By integrating service learning through course curricula for non-credit and credit courses the lifelong learner may find greater interest in participating in higher education courses, particularly human services education. According to an AARP Boomer retirement survey (1998), twenty seven percent (27%) of Boomers strongly agree that they will devote more time to volunteering upon retirement. The same Boomers also expect to devote more time to volunteering while also spending more time with their family, hobbies, travel and leisure, socializing and exercise (Harvard School of Public Health, 2004).

Demographer Brad Edmondson (2005) summed up the potential for travel and education as one of the clearest correlations in consumer demographics. Boomers are the

first generation to benefit from the huge expansion in higher education that took place in the 1960s. In fact, most members of the baby boom generation have been to college, and about three in ten boomers have a college degree (Edmondson, 2005). The baby boom is a huge wave of well-educated people moving into the years after age 55. This will have a huge impact on all kinds of industries, especially educational travel.

The reason is that higher education changes a person's attitudes and interests in all kinds of ways – higher income, better health practices, strong attachment to the alma mater, and more interest in lifelong learning. Travel and education go together like wine and cheese. People who have been to graduate school spend nearly three times the US household average on plane tickets, two-and-a-half times the average on hotels, and twice the average spending on cruise ships. Baby Boomers now account for forty three percent (43%) of all domestic trips taken in the US. In the next few years, their dominance of the travel market will only increase. If you want to know what kinds of travel will sell, ask a 58-year-old woman. She represents the emerging mainstream of the travel industry. And she's your best customer. (Edmondson, 2005, p. 8)

The number of travelers who visit a cultural or historic destination on their trips has risen thirteen percent (13%) in the last six years, or more than twice as fast as growth in the overall travel market (Smithsonian Magazine & TIA, 2003). These places include historic sites, museums, performances, and festivals. According to a study (2003) sponsored by Smithsonian magazine and executed by Travel Industry Association of America, historic and cultural travelers strongly agree that learning while they travel makes their trips more memorable.

As the Boomers retire from their careers, their impact will be felt in major ways. The university linked retirement communities (Pastalan, 2004), groups traveling in educational travel programs (Elderhostel, 2004), Institutes for Learning in Retirement (Deibel, 2003), and volunteering through organized groups (Independent Sector and AARP, 2003) are trends that have grown and expanded throughout the country in the last three decades.

Statement of the Problem

The shifting demographics in enrollments in universities and colleges indicate a growing trend of nontraditional students in higher education institutions. This factor, coupled with the critical number of healthier, well educated, prosperous Baby Boomers, portends that higher education institutions and lifelong learning programs have the potential to play a major role in meeting and serving the present and future needs of society. At the same time, higher education institutions may have financial challenges because of declining state support in meeting the needs of their students, staying abreast of new curricular developments, and improving delivery systems to expand their spheres of influence. Where these challenges of increases in student ages and decreases in financial support converge, universities would be well served by examining ways to attract more out-of-state, affluent students for tuition. This would necessitate the development of new, creative programs of lifelong learning which target retired Baby Boomers.

Research in service learning and the participation of traditional age (those ranging in age from 18-25) college students have been prolific in the last decade, and service learning programs have been integrated into many university curricula. Interestingly,

however, related research on service learning opportunities for the older adults intent on pursuing them is nearly nonexistent, despite what many consider a rapidly growing interest area. Empirical investigations are needed to determine both the factors influencing the choices of middle-aged people with regard to their learning options, and also detailed examples of selected lifelong learning programs launched with the express intent of recruiting these unique learners. Indeed, this topic is only now emerging. It is apparent that universities are generally overlooking opportunities to enroll and involve older adults in their programs, thereby ignoring new and potentially lucrative revenue sources for higher education institutions.

Purpose of the Study

The purpose of this study was to investigate the typologies of Baby Boomers and older adult learners (ages 50-70), and their interest in higher education degree programs and/or continuing education certificate programs to make career changes after age 50 for work in social responsibility areas, including nonprofit community leadership, education, human services, and health care. In addition, this research received input from a sample of these learners with regard to their levels of interest in such programs that may include service learning experiences. A comparison of program preferences revealed different characteristics that can be evaluated for future planning of programs for lifelong learning in higher education institution and nonprofit programs such as Elderhostel.

Variables in the Study

The independent variables in this study were the types of lifelong learning programs chosen by older adults in two categories: traditional learning programs and

service learning programs. The moderator variables were age, gender, and education level.

Research Questions

The following questions served as a foundation for this investigation:

1. What are the typologies of leading edge Baby Boomers and older adults in their choice of an educational program, and why did they select a particular program?
2. Is there interest displayed by leading edge Baby Boomers and older adults in attending lifelong learning institutes, certification training programs and/or university tuition programs in social responsibility disciplines, including human service, education and community leadership to make a career change?
3. Will leading edge Boomers and older adults be interested in working in jobs to improve the quality of life in their community, and what jobs would be of interest?
4. Will leading edge Boomers and older adults favor a grant or tax credit to spend a year in training or to work in community service work?

Definitions of Terms

For the purposes of this investigation, the following terms will apply:

Ageless Learner. A person who is curious, productive, active, creative, learning and adapting throughout the life span of human development and chronological ages (Conner, 2004).

Andragogy. The art and science of helping adults learn (Knowles, 1970).

Baby Boomers. People born in three sub-segment cohorts: leading edge Boomers (people born between 1946 and 1952); middle Boomers (people born between 1952 and 1958); and trailing edge Boomers (people who were born between 1958 and

1964) (Wolfe, 2003).

Elderhostel. A not-for-profit organization and the world's largest adult (50+ years old) learning organization in the field of educational travel and providing a network of Lifelong Learning Institutes for people in retirement (www.elderhostel.org, 2004).

Experiential Learning. For the purpose of this study, experiential learning is education that occurs as direct participation in the events of life (Houle, 1980).

Higher Education. Higher education is the means for creating new knowledge and disseminating existing knowledge (Kerr, 1998). Higher education provides the key route through which individuals achieve the lifelong learning they need to grow as persons, participate in democratic processes, and succeed in a global economy (American Association for Higher Education, 2004).

Lifelong Learning. Lifelong learning is learning in which a person engages throughout life. It includes, but is not limited to, learning that occurs in schools and formal educational programs (Minnesota Virtual University, 2005).

Nontraditional Student. The fastest growing segment of students (25+ years old) in institutions of higher education comprising over forty percent (40%) of the population of total college students, many of whom work full-time, have children, and are part-time students (Association for Nontraditional Students in Higher Education, 2004).

Older adult. For the purposes of this study, an older adult is a human being 65 years old and older (Harvard School of Public Health and MetLife Foundation, 2004). Older adult is now the preferred term for most public speaking and expository writing as defined by Couper & Pratt (1998).

Service Learning. As defined by Ehrlich (1996), service learning is comprised of the various pedagogies that link community service and academic study with each strengthening the other.

Social Responsibility. Social responsibility can be viewed as part of the social contract that is the responsibility of each entity whether it is state government, corporation, organization or individual contributing either to society at large, or on a smaller scale. It can be traced back to ideas such as the golden rule of treating everyone else as well as one wants to be treated by everyone else. For purposes of this study, social responsibility education encompasses health care, education, nonprofit community leadership, arts and culture management, and human services.

Limitations of the Study

The following limitations are inherent in this study:

1. The educational level of participants in programs of educational nonprofits may not be the same as a participant who is already a college graduate and a member of a university alumni association.
2. Service learning in the context of an educational nonprofit may be different from service learning in the context of a noncredit course in a lifelong learning program of different institutions.

Delimitations of the Study

This research will be delimited to the following:

1. Older adults have participated in nonprofit educational programs sponsored at the national level.
2. Older adults have participated in lifelong learning programs and may have been in a regular program, but not a service learning program

Significance of the Study

The potential is great for institutions of higher education to formally strategize, create innovative programs, plan and market to the vast numbers of educated, healthy, and economically stable Baby Boomers entering the retirement age of life. The competition for the minds and the dollars of the potential pool of students has increased dramatically over the last four decades. Public institutions of higher learning have been faced with challenges that include the balancing of teaching and research in the face of budget woes and decreasing income flow from various sources, while at the same time maintaining connections of value with communities of locale and alumni.

Boomers have the probability of another 20 to 30 years of productive life after their working careers end (Wolfe, 2003). Some older adults may turn to higher education for earning another degree or noncredit courses, both of which could include service learning. The revenues from degree-seeking Boomers could become another revenue source for the institutions of higher education that tap into the motivations of the lifelong learner.

Organizations like the American Association of Retired Persons (AARP) have begun to research the potential for greater participation of older adults in volunteerism. According to Dr. Harry R. Moody, Director of Academic Affairs, AARP (2004), there is a need for empirical data on service learning and older adults. The potential is great for the value of unlocking the great bank of volunteer hours of the 36 million members of AARP (Independent Sector and AARP, 2003).

Community service among Boomers and older adults has been rising as seniors view volunteering as both a way to give back to society and as a mechanism for

establishing new friendships to offset those lost when exiting the workforce (Manheimer, 2002). Experienced in life and careers, older adults can help communities throughout the world with solutions to high mortality rates based on lack of clean water, good nutrition, and illiteracy problems. They have drive and energy, and embody wisdom, experience and connections. The role of higher education institutions to meet the needs of society and serve communities can be part of the solutions in addressing some of these needs.

There has been a strong growth in educational nonprofit organizations, including Elderhostel, Global Volunteers, Boomer Senior Corps Volunteers, Civic Ventures, Rotary International, and Volunteer Tourism (VolunTourism). Alumni associations in universities have recently started to integrate service learning into educational travel programs in some programs that could be models replicated for institutions of higher education throughout the country. University alumni associations have begun to engage in meaningful partnerships in volunteer tourism, and alumni are beginning to ask for service learning educational travel programs (Hicks, 2005).

It is anticipated that the results of this study will assist higher education institutions and other nonprofit educational institutions that offer programs for Baby Boomers and older adults to better understand what program offerings and curricula are of interest to the various segments of learners.

Chapter Summary

The involvement of Boomers and older adults in various educational institutions has been growing. This is demonstrated by those adults ranging in ages from 50 to 70 years old who are returning to institutions of higher education for credit and noncredit classes, educational travel with alumni associations and nonprofit institutions, volunteer

and service learning work, living in retirement academy villages, and peer teaching in lifelong learning institutes. Information about this segment of the population holds some important keys to transforming the role of higher education, and creating new learning and serving communities throughout the country.

The demographic revolution, marked by improvements in the health and vitality of older adults is having effects on the trend of lifelong learning and seeking education through one's lifetime. A new "blended life cycle" perspective has emerged combining and more evenly distributing learning, work, and leisure over the entire course of one's lifetime (Eisen, 1998).

As the leading edge of the Boomers approaches retirement age in the next few years, they will continue to have a significant impact on reshaping the landscape of lifelong learning. The sheer number of Boomers available for volunteer work for the betterment of society combined with educational service learning is a major factor to be included in future program planning for institutions of higher education. Coupled with their interest in volunteerism, traveling and education, Boomers are a prime population segment to expand service learning, educational travel programs sponsored by universities, colleges, nonprofits and educational groups. Boomers are also in a position to be the "prime time" population to make mid-course career changes to work in social responsibility areas, including human services, including education, health care, arts and culture, and nonprofit community leadership.

CHAPTER TWO

REVIEW OF THE RELATED LITERATURE

The great use of life is to spend it for something that will outlast us.
- William James

The role of institutions of higher education in American society has been changing, and the challenge for creating new models of instructional and program design in lifelong learning programs that meet the needs of all students, both young and old, is growing. The diversity of American culture provides opportunities for traditional institutions of higher education to provide new delivery systems for information sharing and building foundations of knowledge. Devising strategies to assure viability in a situation severely constrained by resource scarcity will become the key to success (Dennison, 2002).

Because higher education is facing changes in student demographics and demand, and tight budget constraints are pushing colleges and universities into making changes, public institutions are exploring and testing new models in adapting their missions and programs. Significant trends in population growth are Boomers and older adults, which are the fastest growing age groups of the American population and who are creating new learning paradigms within or outside of institutions of higher education.

Traditional higher education in the United States faces a dual challenge in the immediate future: the likelihood of reduced budgets at the same time that the student body is undergoing change. The opportunity facing higher education is also great. Higher education has an understanding of how students learn and how to create healthy, diverse educational communities.

Until recently, public institutions of higher education and older age students have been connected in very few mutually beneficial ways. The missions of many higher education institutions have been myopic and not very comprehensive in meeting the needs of all potential students of multi-ethnic, multi-cultural, multi-generational, ageless diversity and learning constituencies. Originally written in 1997, the ongoing virtual report on *The Future of Higher Education* from UNESCO, the United Nations Educational, Scientific and Cultural Organization, proposed that each higher education institution should define its mission according to the present and future needs of society.

Higher education should be conscious of the fact that lifelong learning is essential for any country or region to reach the necessary level of sustainable and environmentally sound economic and social development; cultural creativity nourished by better knowledge and understanding of the cultural heritage; higher living standards; internal and international harmony and peace, based on human rights, democracy, tolerance and mutual respect; and academic freedom taking into account the need to abide by the rules of ethics, scientific and intellectual rigor; and the multi-disciplinary and trans-disciplinary approach (Rossman, 2002).

Higher education should reinforce its role of service to society, especially its activities aimed at eliminating poverty, intolerance, violence, illiteracy, hunger, environmental degradation and disease, mainly through an interdisciplinary and trans-disciplinary approach in the analysis of problems and issues. Ultimately, higher education should aim at the creation of a new society--non-violent and non-exploitative--consisting of highly cultivated, motivated and integrated individuals, inspired by love for humanity and guided by wisdom (Rossman, 2002).

Higher Education: Tapping the Potential of Ageless Learning

Older adults now dominate the landscape of many segments of American society. There is great potential for higher education institutions to be connected to the new Academy Village (theacademyvillage.com, 2004) concepts as exemplified by Dr. Henry Koffler, president emeritus of the University of Arizona, replacing the “senior citizen center” and become “learning and serving” communities. “Highly cultivated, motivated and integrated individuals, inspired by love for humanity and guided by wisdom” are qualities embodied in many lifelong learners who also have more time to serve and help change the mission of higher education as defined by UNESCO. Older adults want to learn and serve (Fenzel, 1997), and the partnership of higher education with older adults is beginning to emerge in the progressive agendas of institutions of higher learning.

Age Wave author, Dr. Ken Dychtwald (1990), asserted that the “age wave” of Boomers and older adults will challenge every aspect of American society including education. In the future, older adults will be more active, healthier, better educated, and more affluent than those of past generations. In turn, older adults and Boomers will demand lifelong learning opportunities to maintain and expand their level of educational attainment. Marked by improvements in Boomers’ and older adults’ health and vitality, the demographic revolution has changed the face of society. A new “blended life cycle” perspective has emerged combining and more evenly distributing learning, work, and leisure over the entire course of one’s lifetime (Eisen, 1998).

Trends in College Enrollments

Demographic trends in higher education show a continuing increase in the nontraditional age student population. The percentage of part-time enrollment has grown

in both two and four year institutions. Nontraditional students are over forty percent (40%) of the population of total college students, many of whom work full-time, have children, and are part-time students, according to the Association for Nontraditional Students in Higher Education (2004). Working adults also make up the greatest share of graduate students. Two thirds of master's degree students and half of doctorate students nationwide are studying part-time. According to author Abigail Trafford (2005), nearly 85,000 men and women over 50 are full-time students in undergraduate and graduate programs. Nearly 435,000 are part-time students and about 120,000 earning graduate degrees.

The demand for continuous, lifelong learning is supported by the increasing needs of working people to retool and update their skills to respond to changes in job demands. The increasing pace of technological innovation and trends towards multiple career changes will keep demand for nontraditional students high. "People are changing careers on average every several years now, instead of staying in a job for life," wrote Edward Cornish, Founder and President, the World Future Society (1996).

About one quarter of the undergraduate population in academic year 1999-2000 was classified as traditional; that is they earned a high school diploma, enrolled full-time after high school, depended on parents for financial support and did little paid work during the school year, if any at all. In 1970, twenty eight percent (28%) of all college students were 25 years of age or older. In 1998, the number of adult learners had increased to forty one percent (41%) (Lunsford, 2003).

According to the National Center for Educational Statistics (2001), college enrollment in public institutions is expected to rise from 13.9 million 1995 to 16.1 million

in 2007, and in private institutions from 3 million to 3.5 million. The number of graduate students nationwide is also expected to increase during this period, with the number of masters degrees awarded rising from 400,000 to 450,000, and the number of doctorate degrees rising from 43,000 to 48,000.

The number of students age 35 and older in degree-granting institutions has soared from about 823,000 in 1970 to an estimated 2.9 million in 2001, doubling from nine point six percent (9.6%) of total students to nineteen point two percent (19.2%) according to the National Center for Education Statistics. The Institute for Higher Education Policy in *Life after Forty: A New Portrait of Today's and Tomorrow's Postsecondary Students* (1999) reported that students aged 40 and older increased by two hundred thirty five percent (235%) from 1970 to 1993. The Association for Nontraditional Students in Higher Education (ANTSHE, 2004) reported that students who are over 25 make up forty seven percent (47%) of the new and returning population on many of today's college campuses. Now a majority of students categorized as nontraditional students or contemporary students either as full-time or part-time students have impacted the ways that higher education must operate and teach for new students.

The traditional college student has been defined as a person aged 18-25 years old who enters the higher educational institution without much life or work experience. The demographics of students in higher education have been gradually shifting in the last decade. The overwhelming majority of students in post-secondary education are considered nontraditional (ANTSHE, 2004).

Mbilinyi (2006), author of *Degree of Opportunity*, a new national study of the attitudes of adult Americans toward continuing their education, indicates that more than

half of American adults age 25 to 60, the equivalent of more than 70 million adult Americans, would like to pursue additional education. The study, sponsored by Capella University, also reveals the reasons millions of adult Americans are returning to school. The Mbilinyi study (2006) also revealed the barriers that are preventing others from pursuing their educational goals. The study found out that American adults overwhelmingly believe that advanced learning is an investment that pays.

In the 21st Century, higher education institutions are replete with the many challenges that confront Western society today, especially funding for all areas of a traditional university. In the past, colleges and universities focused on traditional younger students and categorized older adults into separate programs. Today there is more mainstreaming of older adults into regular courses, some for free and some at discounts on tuition (Timmermann, 2003).

There is more general desire by adult students to validate a lifetime of effort or to seek fulfillment through additional education (Hodgkinson, 2001). According to Dewey (1938), education must be reconceived, not as merely a preparation for maturity, but as a continuous growth of the mind and a continuous illumination of life. Alexandre (2006) is director of Antioch University's Ph.D. program in leadership and change. Alexandre said that it was easy to see that there is interest in the kind of non-traditional doctorate that Antioch created.

The students are already far along in their careers and lives – eighty five percent (85%) are over 40, with many in their 50s and 60s – and they don't need the doctorate as a credential. No one is coming at 55 because they need it for their

job. So why are people paying \$80,000 for a doctorate, remarked Alexandre. (2006, p. 1)

The answer is that Antioch's doctoral students are on an evolved path in which they are seeking to take their understandings of organizations to a higher level, and want to conduct the kind of in-depth research associated with doctoral programs.

Trends in the Aging Population and Motivations in Higher Education

The National Council on Aging (2002) reported that by 1890, there were only 4 million Americans over age 65, representing less than four percent (4%) of the population. By the early 1960s, the number of older Americans had quadrupled, to 16.5 million. The Census Bureau projects the 65+ population to be 39.4 million in 2010, 53.2 million in 2020, and 69.4 million in 2030. By the year 2030, at least 1 in 5 Americans will be age 65 or older.

Peterson (1987) identified the four aspects of this demographic trend that are especially significant to higher education. First, the number of traditionally aged students is on the decline. Second, the number of middle-aged and older adults is rapidly increasing. Third, the median age of tenured faculty is increasing, resulting in higher costs and reduced flexibility for institutions. Fourth, knowledge and information about the aging process have grown as intellectual and social interests in aging have increased.

In research on differences in motivated strategies and learning strategies between traditional students and nontraditional students (age 25 or above), Spencer (1999) surfaced some interesting distinctions. He found that the traditional age students rated themselves higher in: Extrinsic goal orientation, test anxiety, rehearsal, effort regulation and peer learning. The nontraditional age undergraduates rated themselves higher on

several motivated strategy subscales including: Intrinsic goal orientation, task value, control of learning beliefs, and self-efficacy for learning and performance (Spencer, 1999). Nontraditional students rated themselves higher on several learning strategy subscales including: Organization, meta-cognitive self-regulation and critical thinking (Spencer, 1999). Conclusions from Spencer's (1999) study suggested that nontraditional students appeared to be intrinsically motivated, placed higher values on classroom education experiences and learning processes and were self-determined learners. The traditional age students appeared to be extrinsically motivated with high degrees of test anxiety.

The internal processes of striving for personal growth, self-awareness, personal insight, and self-knowledge have been studied and researchers including Kasworm (1994) have found a development tendency toward intrinsic motivation with age. The doctoral dissertation research of Pourchot (1999), University of Northern Illinois, has indicated that for adults, the higher educational experiences both facilitates personal growth and results from prior growth experiences and needs. Pourchot (1999) suggested that in comparison to younger college students, older adults' motives toward educational participation are more intrinsic and personal growth oriented. Only recently has research directly addressed personal growth as a motivator for adult achievement.

Manheimer (2003) wrote that the liberation of aging will mean recovery of the ancient path of life constraints of social conventions, but also they will be free to reconnect with the great spiritual traditions that endow old age with attributes of prudence, humility, and contentment. Novelli (2006) observed that people age 50 and over want to leave a lasting legacy by leaving the world a better place than they found it

and giving back more than they take, especially helping those less fortunate than themselves.

According to Erikson (1986), theories of adult development frequently describe age-related developmental tasks at different life stages. Research has found that the hallmark of the midlife generativity stage is giving back to the next generation. This need was described by Kotre (1984) as the desire to invest one's substance in forms of life and work that will outlive the self. According to adult developmental theories, it is natural that adult needs would turn more toward personal growth and fulfillment and become less externalized with age.

In her article, *Scope of Education Programs for Older Adults*, Waskel (1982) described five basic categories of needs. The first need is that of coping, dealing with the various physical, mental and emotional changes brought about increasing age. The second need is to be expressive, to have continued social interaction, as well as the use of one's senses and muscles. The third need is for a feeling of being contributive, continuing to give to others, which helps to provide a sense of feeling both wanted and needed. The fourth need is to have some control over the direction and quality of life. The final need is for transcendence, or the need for older individuals to feel that they are somehow better off or at a higher level of existence than they were in the past. The educational experience of returning to the classroom helps older adults to satisfy many, if not all, of these needs.

Schuller (1993) referred to a mass of anecdotal evidence about the effect of education on physical and psychological well-being and made a plea for carefully designed case studies to be carried out to substantiate such evidence. Awareness of the

potential benefits of positive, healthy lifestyles of older people has been increasingly of major interest to professionals in several fields of study. Their participation in social, leisure, and physical activities are positively related to higher levels of health, self-esteem and life satisfaction.

Education for older adults is an “investment in society” (Fisher, 1992). According to Fisher (1992), there are four major responsibilities that colleges have to post retirement students. Higher education should play an important role in helping older generations understand values, culture, and technology. Higher education should act as a catalyst for mobilizing Boomers and older adults’ productive roles in society in their 20 or 30 years of life after retirement. Higher education has a responsibility to foster diversity in intellectual, cultural, and social life by educating students of all ages about aging and ageism. Higher education has a responsibility to foster the effective use of limited resources by reducing the older adult’s need for health and social services.

In 1971, the White House Conference on Aging, led by Howard McClusky, a pioneer in the field of educational gerontology, publicly and nationally recognized the elderly population’s need and right to participate in continuous lifelong learning. This conference was significant in that it established public policy to support education programs for older adults.

Education is the basic right of all persons in all age groups. It is continuous and henceforth one of the ways of enabling older people to have a full and meaningful life, as a means of helping them to develop their potential as a resource for the betterment of society (Waskel, 1982, p. 125). Education is deemed one of the best ways to attain the

higher psychological goal of fulfillment in the last stage of life and reaching self-actualization (Martin, 1997).

Personal Characteristics of Lifelong Learners

Lifelong learning is part of one's lifespan. Researchers in education have begun to gather empirical data on the motivations and needs of lifelong learners. Most studies have been carried out by demographers, sociologists, medical researchers and gerontologists (Dale, 2000), and the field is emerging in educational research.

The participation of lifelong learners in educational activities has demonstrated the need for lifelong learning to be about personal fulfillment and the promotion of well-being of individual citizens as well as being concerned with social, democratic, and economic development (Brady, 1983). Recent research validates the earlier research and focuses on the importance of lifelong learning for one's own well-being. (Cusack, Thompson, & Rogers, 2003).

Several categories of motives of older adults for participation in educational programs that are suggested by the literature include: desire for intellectual stimulation (Romaniuk & Romaniuk, 1982; Bynum & Seaman, 1993; Lamdin & Fugate, 1997), opportunity for a new experience (Romaniuk & Romaniuk, 1982), pursuit of an interest (Lamdin & Fugate, 1997), learning something useful (Puccio, 1995), love of learning (O'Connor, 1987), and social contact (Bynum & Seaman, 1993; Lamdin & Fugate, 1997). Despite all of the varying classifications of motivations for older adult learners, those related to cognitive interests always prove to be the strongest motivator followed by a desire for socialization (Martin, 2004).

This desire for socialization is also confirmed through the work of Knowles (1976). The concepts of collaboration and teamwork follow Knowles' (1976) precept that adults learn more productively when they share responsibility for the learning process by actively participating in the planning and operation of the experience. Knowles also found that adults who can relate their personal experiences to their studies have a stronger personal commitment to learning.

Knowles (1970) made several assumptions about andragogy, the process or the science of the study of adult education:

1. As one develops as an adult learner, one moves from a dependent self-concept toward of being a self-directed and independent personality.
2. Adults, as they grow and experience, build up a fund of knowledge that increasingly can be tapped for part of the learning process.
3. Learning becomes more socially oriented as the learner matures.
4. Motivation to learn is internal in adult learners. Adult learners need to understand why they are being asked to learn something, how it relates to their goals.
5. Adults learn better and are more willing to participate when the learning is experiential. Adults want to apply what they learn and as a result they view learning as problem solving. Better learning is obtained when adults believe that the topic to be learned is of immediate value to the adult learner. (p. 12)

The adult's experience is a key resource in any learning effort. These characteristics of the adult learner are important in the development of lifelong learning programs in higher education and the typology of adult learners in this study.

In the recent work of Kuhn (2000), the 10 Characteristics of Adults as Learners included:

1. Adults generally desire to take more control over their learning than youth.
2. Adults draw upon their experiences as a resource in their learning efforts more than youth.
3. Adults tend to be more motivated in learning situations than youth.
4. Adults are more pragmatic in learning through youth.
5. In contrast to youth, the learner role is secondary for adults.
6. Adults must fit their learning into life's "margins."
7. Many adults lack confidence in their learning.
8. Adults are more resistant to change than youth.
9. Adults are more diverse than youth.
10. Adults must compensate for aging in learning. (p. 1-4)

Adult Learners and Participant Typology

Central to this study is Cyril Houle's tripartite typology of adult learners. In his book *The Inquiring Mind* (1961) Houle wrote that if we are to ever understand the total phenomenon of continuing education, we must begin by understanding the nature, the beliefs, and the actions of those who take part to the highest degree. Based on the work of Houle and others, the typologies used for this study were developed by Dr. Nancy Arsenault (1998). Participant types were identified in her study: the Geographical Explorer, the Adventurer, the Activity-Oriented, Content-Committed, Experimenter and Opportunist. Arsenault's research (1998) defined the participant typologies:

- (1) Activity Oriented. The Activity-Oriented will only register in programs that include some form of physical activity. The Activity-Oriented person wants to be outdoors, explore the natural environment, and be actively engaged in their learning. This could be golf, hiking, canoeing or walking through nature to bird watch. This type of person enjoys the outdoors, wants to learn in the natural environment, and is not attracted to programs where the entire learning component is perceived to be in a classroom.
- (2) Experimenter. The experimenter is the novice participant who is investigating the educational program by trying a variety of programs to see where their interest lies. Their first experience is close to home (one tank of gas) and they select their program based on: (a) enrolling in a course with a physical activity option because they are afraid of entering a setting which is too academic; or (b) they enroll in an academic course in which they possess some pre-requisite knowledge.
- (3) Content-Committed. Subject is everything. They are willing to travel anywhere to find a site with a program that supports their learning interests in a particular subject area. Good instruction at a university level is critical, and this person is willing to wait until their subject comes up rather than attend a site outside their subject area. Location is not as important.
- (4) Adventurer. They are willing to go anywhere and try anything. They are looking for new experiences in learning and socializing and will even sacrifice accommodation preferences just to have a new experience. They select a region, area or city they would like to explore. The type of educational

program is not a priority consideration. What draws this person to a given site is the opportunity to see, explore and learn about a new area. The primary interest is to learn about the area and when possible will extend their visit to continue exploring.

(5) Opportunist. This person sticks out like a sore thumb and can be ostracized by the regular participants. The opportunist enrolls not for reasons related to the educational program, rather for some personal reason like taking advantage of inexpensive meals and accommodations while visiting an area.

(6) Geographical Explorer. They select a region, area or city they would like to explore. The type of Elderhostel program is not a priority consideration. What draws this person to a given site is the opportunity to see, explore and learn about a new area. The primary interest is to learn about the area and when possible, geographical explorers will extend their visit to continue exploring. (p. 110)

The Value of Volunteering as Prelude to Service Learning

As the rapidly growing pool of competent, college-educated adults soon reach their retirement years, some may choose to work part time, and some will also seek out continued learning opportunities. Many of these individuals will be attracted to educational organizations that allow them to play active roles by helping to shape curricula, teach by drawing on both their expertise and life experiences, organize courses, participate in governing the organization, and serve in a multitude of ways that satisfy their desire for a renewed sense of community. They are prepared to pay sufficient fees and to volunteer their time to make these organizations financially viable (Manheimer,

2002). The Boomers who make up today's majority of volunteers (Civic Ventures, 2005) will be in "prime time" to tap for volunteer service in the context of educational service learning.

One major area that enables older people to have a full and meaningful life is through the millions of hours of services given to communities in the form of volunteering. Beginning with a scan of the overall volunteer pool, research revealed the important overall potential of volunteers available for serving communities (Independent Sector, 2003). The possibilities are infinite for integrating the potential of the sheer number of Baby Boomers who can be recruited into programs of higher education combined with the voluminous number of Baby Boomers who will volunteer their services for communities.

According to a national survey conducted by Independent Sector (2000), almost 84 million U.S. adults volunteered 15.5 billion hours in the year 2000. This "volunteer army" represented the equivalent of over 9 million full-time employees at a value of \$239.2 billion. According to a study by Independent Sector (2003) entitled *Experience at Work: Volunteering and Giving Among Americans 50 and Over*, by Independent Sector and the American Association of Retired Persons (AARP), the Baby Boom generation represents the largest untapped pool of potential volunteers for the nonprofit community in recent history. As Baby Boomers begin to approach retirement age, nonprofit organizations will face unprecedented opportunities and challenges to engage this population. *Experience at Work* gave an analysis of the over-50 population in the United States by examining the current giving and volunteering patterns of this age group and

comparing the philanthropic habits of Americans still in their working years, aged 50 to 64, and those who are retired, aged 65 and over.

The report, released during the 2003 Independent Sector Annual Conference in San Francisco revealed that members of the working population aged 50 to 64 are more likely to have graduated college, volunteered in their youth and had parents who volunteered; these are all indicators of higher levels of adult civic involvement. This age group has the highest income level, gives the most, and has the greatest potential to increase volunteering and giving for years to come.

The retired population over 64 is less likely to have graduated from college, has the lowest level of income and gives the least amount of money to charities. Although they tend to volunteer at a lower rate than their working counterparts, retired Americans give more hours on a regular basis. *Experience at Work* also revealed: (a) the over-50 population is expected to grow by 18.3 million people over the next ten years; (b) those in the 50 to 64 age group will show the largest increase of 13.9 million people; these 50- to 64-year-olds will still be employed, earn the most and become the most generous givers; (c) nonprofits can expect an increase in the number of high givers from this age group; and (d) more of this population will be available to volunteer more often.

The development of higher education models that customize their approach to recruit this segment of the population for new learning and serving communities is emerging in different academic communities. Analogous to the environment of higher education, AARP recommended that nonprofits: (a) create a climate respectful of older adults; (b) recognize and work to overcome barriers to volunteerism (such as time constraints) by offering more flexible hours; (c) provide opportunities for volunteers with

disabilities and health concerns; and (d) provide more accessible volunteer opportunities such as virtual volunteering. The trend has spawned additional new organizations including Civic Ventures, the Boomer Senior Service Corps and others.

David Eisner is the Chief Executive Officer of the Corporation for National and Community Service, a federal agency that connects Americans with places to volunteer. According to Greene (2005), Eisner stated that the best way to stay healthy as you grow older is to stay engaged in the community. It lowers rates of depression and suicide, the incidence of heart attacks, strokes and diabetes, and even lower the likelihood that folks will get high blood pressure. Eisner remarked that Boomers, even a fraction of them, could literally solve issues like ensuring that children are prepared to enter school and prepared to learn through tutoring and other human services and volunteering.

In remarks on *Designing Meaningful New Volunteer Roles for Retired Persons*, Hadley (1998) noted:

Themes of self-worth and the common good have emerged as central to today's discussion. Volunteerism, many have observed, has little to do with being a do-gooder. It is about valuing the person, and increasing the value of social and human resources; it is about self-esteem, freely sharing one's talent and wisdom; it is about being valued, not paid; it is about empowerment, growth and creativity; it is about enhancing the community's quality of life. It is also about having fun in the process. The third stage or Troisieme Age of human development is a time when we give back to society the lessons, the wisdom and resources that we have derived throughout our long and productive live. The Troisieme Age is a special period when we can deepen our wisdom and personal sense of spiritual identity.

Whatever emphasis each of us might place on this stage of life, our full engagement implies an enhancement of the common good. (p. 2)

Boomers can also provide the needed social capital in the 21st century in human services, education, health care and community leadership. According to Putnam (1993), social capital is those features of social organization including networks, norms of reciprocity and trust that facilitate cooperation for mutual benefit. In the *Blueprint for the Next Chapter*, Newhouse and Goggin (2003) designed the Social Gain Formula.

The phenomenon is that the Boomers turn 60. The assets are unprecedented human capital. The impetus is their determination to contribute. The means is freedom to work. The vehicle is the way to create greater work. The return is in the form of experience dividends. (p. 2)

Higher Education and Service to Society through Service Learning

The concept of service learning is based primarily on the view of John Dewey, who advanced the concept that active student involvement in learning is an essential element in effective education (Waterman, 1997). Dewey viewed the community as an integral component of educational experiences for both enhancing a student's education and for developing future societies.

Campus Compact (2004) defined service learning as the process of integrating volunteer community service, combined with active guided reflection into the curriculum to enhance and enrich student learning of course material. It builds on a tradition of activism and volunteerism that was popular in the sixties but greatly subsided during the seventies and eighties. The tradition of volunteer service saw a rebirth in the late eighties as cultural, educational, and civic leaders challenged higher education to fulfill its historic

mission to promote civic responsibility. Many colleges accepted this challenge and created the support network, Campus Compact, to develop and promote service learning as a pedagogical strategy. Service learning is now a national movement and is utilized in the majority of colleges and universities in the United States. According to Campus Compact Montana Director, Dean McGovern (2003),

When civic engagement activities are strategically and intentionally integrated into the work of faculty, staff, and students, colleges and universities will be operating in accordance with their public purposes and, rather than simply residing in their communities, will become critical and appreciated resources of their communities. (p.77)

Service learning is a form of experiential education, deeply rooted in cognitive and developmental psychology, pragmatic philosophy, and democratic theory (Morton & Troppe, 1996). It shares a common intellectual history with organizational development and participatory action research. Service learning theory begins with the assumption that experience is the foundation for learning. Various forms of community service are employed as the experiential basis for learning.

According to Ehrlich (1996), the basic theory of service learning is John Dewey's: the interaction of knowledge and skills with experience is the key to learning. Students learn best not by reading the "Great Books" in a closed room but by opening the doors and windows of experience.

The philosophical antecedent and academic parent of service learning is experiential learning. The experiential learning model known today has been shaped over time by John Dewey (1938), Kurt Lewin (1951) and Jean Piaget (1952) and with

more recent contributions by David A. Kolb (1984). As in all types of experiential learning such as cooperative education, internships, and field placements, service learning directly engages the learner in the phenomena being studied with the hope that richer learning will result. The critical difference and distinguishing characteristic of service learning is its twofold emphasis on both enriching student learning and revitalizing the community. As a form of experiential education, service learning is distinguished from among other forms of service by its intention to benefit equally the provider and the recipient of the services as well as the assurance of equal focus on both the service being provided and the learning that occurs as a result.

There are three general characteristics of service-learning: (a) It is based on the experience of meeting needs in the community, (b) It incorporates reflection and academic learning, (c) It contributes to students' interest in and understanding of community life (Bringle & Hatcher, 2000).

To accomplish this, effective service-learning initiatives involve students in course-relevant activities that address the real human, safety, educational, and environmental needs of the community (Sigmon, 1994). Students' course materials such as texts, lectures, discussions, and reflection inform their service, and the service experience is brought back to the classroom to inform the academic dialogue and the quest for knowledge. This reciprocal process is based on the logical continuity between experience and knowledge.

As suggested by Sigmon (1994), two poles identify the service learning continuum: "service-LEARNING" and "SERVICE-learning. First, "service-LEARNING" emphasizes classroom learning, while the service experience provides a

setting whereby concepts are applied to that specific context using traditional classroom techniques (e.g. lecture, readings, and discussion). Second, “SERVICE-learning” emphasizes the service learning experience, while the classroom setting encourages the reflection of their community involvement. In the middle of this continuum is what Sigmon considers the ideal form of service learning: “SERVICE-LEARNING.” Here both service and learning are equally weighted with regard to both the learning and service experiences. Each compliments the other as the classroom enhances the service and the service enhances the classroom. In addition, this form of service learning also creates an atmosphere of mutual participation and accountability among faculty, students, and agency partners.

The pedagogy of service learning represents a substantial change from the traditional lecture driven, content based, and faculty centered curriculum (Zlotkowski, 1998). Although the research has shown that we remember only ten percent (10%) of what we hear, fifteen percent (15%) of what we see, and a mere twenty percent (20%) of what we see and hear, these remain the basic sense modalities stimulated in most educational experiences. Service learning strategies recognize that we retain sixty percent (60%) of what we do, eighty percent (80%) of what we do with active guided reflection, and ninety percent (90%) of what we teach or give to others. It views education as a process of living, not a preparation for life.

Service learning fosters the development of personal and interpersonal knowledge grounded in an interdisciplinary perspective that illuminates self-understanding and provides the basis for effective teamwork. Service learning encourages students to be more self-reflective about who they are, what they value, and the reasons for their values.

It promotes the development of interpersonal and communication skills related to effective and cooperative problem solving (Bonar, 1996, p. 14-15).

In a culture characterized by information overload, effective teaching must encourage information processing as well as accumulation. In a complex society, it is almost impossible to determine what information will be necessary to solve particular problems. All too often, the content students learn in class is obsolete by the time they finish their degree.

Service learning provides students with real-life, meaningful experiences that by their very nature force critical thinking (Sigmon, 1994). In service, students encounter events which conflict with their assumptions. They deal with issues or incidents that challenge their competency or understanding. These experiences create perplexity or dissonance, which is often the beginning of learning.

In service learning courses, real life comes tumbling into the classroom as students' service experiences provide the content for purposeful dialogue leading to real understanding of academic concepts. Unlike most pedagogues that are deductive, relying on presenting theory and then encouraging application to specifics, service learning is more inductive, using experience provided by students to lead to conceptual or theoretical understanding. (Astin, 1992, p. 251)

Service learning is best understood in the context of a continuous learning cycle, as in Kolb (1984), where meaning is created through concrete experience, reflection or assimilation, abstract conceptualization or theory building, and active experimentation or problem solving.

Proudman (1995) described experiential education first and foremost as emotionally engaged learning in which the learner experiences a visceral connection to the subject matter. Good experiential learning combines direct experience that is meaningful to the student with guided reflection and analysis. It is a challenging, active, student-centered process that impels students toward opportunities for taking initiative, responsibility, and decision-making. An experiential approach allows numerous opportunities for the student to connect the head with the body, heart, spirit, and soul. Whatever the activity, it is the learning and teaching process that defines whether a learning experience is experiential. Further, an experiential learning process can be conducted almost anywhere and with any type of activity or learning medium. (p. 241)

An extensive scan of the research in the field of service learning has focused on the traditional age college students and has been widely discussed in the last decade. Service learning programs have been integrated into the curriculum of courses in various disciplines. According to Astin (1997), several studies have documented the positive effects of participating in community service and service learning for college undergraduates who became involved in service activities. Research in service learning as related to older adults is sparse, and few authors on this topic were found in this literature review.

Fenzel (2003) studied the alumni of a religious-affiliated liberal arts college who participated in a phone survey that examined their present and past behaviors related to service and their current service-related careers. Results showed that participation in both general community service and service learning as undergraduates positively

predicted alumni attitudes toward social and personal responsibility, as well as alumni involvement in post-college community service and in service related careers. In addition, service learning participation exerted an effect over and above that accounted for by community service participation, although effect sizes were relatively small.

Reflective of a trend, Kiely and Nielson (2003) wrote that combining service learning with study abroad is a powerful pedagogical innovation for increasing adult students' intercultural competence, language skills, and experiential understanding of complex global problems related to their academic program of study.

The Lifelong Learners' University Academic Village

Older adults have become a more common sight on college and university campuses. College administrations and facilities managers need to plan for an even larger presence of senior citizens participating in their courses and using their facilities in the future (Kressley, 1998). By making the necessary physical accommodations and planning programs appropriate for their senior clientele, these institutions can play a major role in bringing older students onto campus as part of the expanding lifelong learning trends. Finally, by serving this segment of the population, institutions can also insure their continued prosperity and survival. Many higher education campuses have already spent a lot of money to implement the facilities changes mandated by the Americans with Disabilities Act. This is one point of convergence that will serve people with disabilities and older adults, too.

The incorporation of a university linked retirement community holds implications for an institution's programming and may expand traditional strands of scope of the university community. An increasing number of institutions now offer retirement

facilities on campus to retired graduates (Kressley, 1998). Other institutions will find that they can survive declining youth enrollments by converting their facilities for use by the aging. Hogan (1999) wrote that one alternative rapidly growing in popularity is the co-location of retirement communities with college campuses.

Campus-oriented retirement communities are popular with seniors for a number of reasons. First, college campuses have been identified as an area where retirees like to come since they offer a wealth of events and attractions to enjoy. Some retirees are drawn to college campuses simply to interact with a younger crowd, and joining in college activities helps boost retirees' self-esteem. Mingling with younger adults provides the elderly with stimulation, happiness, and an emotional pickup (Kressley, 1998). There is some evidence that this type of interaction may actually have an associated health benefit by potentially helping to retard dementia.

Many retired alumni are attracted to coming back to the college campus where they spent some of the best years of their lives. One senior citizen was quoted as saying that he had "returned to retire where his adult life began" (Gajilan, 1998, p. 1). The young-old adults are looking beyond the golf course and the bridge table toward increasing the vitality of the integration of body, mind and spirit.

Some colleges are actively recruiting retirees with housing that allows them to live on or adjacent to campus, and with many of the perks enjoyed by faculty and staff. There are currently more than 100 campus-oriented retirement communities in existence around the country (Davis, 1999). These include schools such as Dartmouth, Stanford, Penn State University, Ithaca College of New York, the University of Alabama, and the University of Florida. Business Week Online (2004) reported Pastalan, author of

University-Linked Retirement Communities and an emeritus professor of architecture at the University of Michigan, as saying that Boomers have always expected more. When they start retiring in five years, they're going to demand more opportunities for personal growth. That is where the colleges come in.

The Academy Village (2004) is one successful example of lifelong learning communities affiliated with the university campus near Tucson, Arizona. The Academy Village was co-developed by Dr. Henry Koffler, President Emeritus of the University of Arizona, with a for-profit development company. Dr. Koffler's mission was to create a community whose residents would have easy access to lifelong learning, and also the willingness to share, not by their love of bingo or golf, but for their love of learning. Dr. Koffler saw a utopia of sorts. "The brain needs exercise, not just the body," the 75-year-old stated. "The idea is to provide opportunities for people who want to remain engaged intellectually. There is nothing magical about being 65. It's not like you hit that age and you lose your capacity to be creative and contribute." (Dallas Morning News, 1998, p. 1). A key major fact is that emphasis is placed on volunteer work and residents who have the opportunity to give back to the larger community. Service learning projects are being integrated into the lifelong learning programs.

To offer intellectual stimulation and networking opportunities for community members who share an interest in lifelong learning, retirement communities near universities, some in affiliation with the Elderhostel Institute Network, have established Institutes for Learning in Retirement (ILR). There are more than 250 such institutions across the country including Harvard, Northwestern, UCLA and Duke. The Elderhostel

Institute Network (EIN) is a voluntary association of Lifelong Learning Institutes (LLIs), funded by Elderhostel, Inc. (www.elderhostel.org, 2004).

Designed for older adults, ILR classes cover many subjects. Topics may include genealogy, art and music appreciation, history, computer use, philosophy and current events. When a student takes an ILR class for noncredit, there are no tests, no grades, no prerequisite degrees or diplomas required and homework is optional.

The synergy of the well-educated senior communities is a source of lecturers and a source of mentors for students in the university. Dr. Koffler stated that there is an even greater benefit to the fiscal soundness of a university: Forging closer ties to community retirees results in more generous donations and bequests, especially when the retirees are already loyal alumni of the university. According to Walters (1987), individuals contributing to a college or university tend to increase their level of giving and employ a wider variety of avenues for making contributions as their personal needs are satisfied. In addition, Pray (1981) noted that individuals who are actively involved in the ongoing educational mission of an institution of higher education are the most likely to be significant contributors.

Experiential, Educational Travel

As recorded by Litvin (1998), travel can perhaps become the missing aspect of promoting peace around the world. He quoted John F. Kennedy: "Travel has been one of the great forces for peace and understanding in our time..." (Litvin, 1998, p. 63). Travel can transcend the tradition of wanton leisure and excessive pleasure by focusing on what Houle (1984) described as deliberately educative travel. These excursions of self-directed purpose have the potential to teach the traveler whatever they wish and to

continue education for the length of a lifetime. People who travel together often form a close bond; this dependence on one another may arise from a psychological motivation to create a sense of safety in a rapidly changing world (Wolfe, 2003).

The Travel Industry Association (2004) reported that Baby Boomers households, more than any other age group, generated the highest travel volume in the U.S. in 2003, registering 268.9 million trips. Boomer households (households headed by someone age 35-57) are the most likely to stay in a hotel, motel or bed and breakfast establishment on overnight trips (59%) and travel for business (29%).

Programs that combine education and travel will continue to rise in popularity as the proportion of educated retirees increases throughout the 21st Century. The boom market in adult education is to be found in education for leisure and recreation rather than in job-related education (Cross, 1992).

Learning in travel takes the form of preparation. Reflecting ideas of andragogy Knowles (1985), reading prior to the trip, during and after the trip, confirms learning as well as promotes self-directed knowledge. According to Roberson (2003), in examination of learning experiences of older adults during travel, four themes emerged from the data: learning about personal character, learning about trust, learning about the world, and learning about home.

Duke University neurobiologist, Dr. Lawrence Katz (2005) wrote that those people who age successfully seem to have what he calls a “neurobic” lifestyle. He noted that they are the people who travel a lot.

They travel but they don't go on a cruise ship to a resort in a different country, but actually travel and have new experiences in different places where they actually

engage with the place they're in. They have wide networks of friends, they are unafraid to try new things even quite late in life even if they don't become expert at it. You meet these people at 80-years-old and they're as sharp as you hope to be at 50. You look at how they've lived, and you say that's a brain healthy lifestyle. (p. 11)

Lifelong learning programs that have sustained momentum, growth and leading successful examples are the Elderhostel programs that began nearly 30 years ago. Elderhostel (2004) programs were conceived by two men, Marty Knowlton, a world traveling, free spirited, social activist and former educator, and David Bianco, a highly organized university administrator. Seeing Europeans in their 60s, 70s and 80s playing an active and positive role in their communities made Knowlton wonder why their American counterparts didn't have a similar opportunity to remain active after retirement. Knowlton asked: "Why not give them continued opportunities to learn as well?" (p. 1)

Back in the U.S., Knowlton shared stories of his travels with Bianco, then director of residential life at the University of New Hampshire, asking: "Why should older Americans be expected to disappear quietly into a mundane retirement?" (Elderhostel, 2004, p. 2)

Bianco, after hearing about Knowlton's experiences, exclaimed, in a burst of enthusiasm: "This campus ought not to be having a youth hostel, it ought to be having an elder hostel," (Elderhostel, 2004, p. 3) and the name was born. A series of sometimes heated discussions followed, and a learning program was conceived that combined stimulating not-for-credit classes on a wide variety of subjects with comfortable, inexpensive lodgings.

The programs provide “high-quality, affordable, educational adventures for older adults” and are “based on the belief that retirement does not mean withdrawal from meaningful activity and that the later years should be viewed as an opportunity to enjoy new challenges” (Elderhostel, 2004, p. 4).

Elderhostel (2004) is a not-for-profit organization that provides exceptional learning adventures to nearly 300,000 older adults each year. Elderhostel offers over 10,000 programs a year in more than 100 countries. The programs consists of one to four week long resident courses at over 2,000 educational and cultural sites worldwide, providing “education adventures” for those aged 55 and older. Over 1,500 of these sites are colleges and universities. The courses are conducted in informal classroom environments that promote participation, discussion, and intellectual exchange in a variety of liberal arts and sciences subjects.

The trend in the last few years is the emergence of service learning programs embedded in educational travel programs and the participation of older adults. University alumni associations, nonprofit organizations and successful programs like Elderhostel have created programs of interest for older adults that appeal to the intrinsic values of personal growth, development and self-actualization of the older adult.

Another increasingly popular Elderhostel program strand is the Elderhostel Service Learning Institute educational programs where students experience learning through educational travel coupled with the intrinsic value of revitalizing a community through volunteerism. The Elderhostel Service Programs began in 1992. Since then, thousands of older adults have enrolled in Elderhostel Service Programs at sites in the U.S. and around the world.

Elderhostel Service Programs engage hostellers in short-term volunteer projects with nonprofit organizations throughout the United States and foreign countries. Approximately one-third of the time is spent on educational components that inform and enhance the project work. The projects are varied and offer opportunities to assist efforts in historic preservation, archaeology, museum work, conservation work, marine and wildlife research, teaching English, camps for special children, tutoring, community development, sustainable agriculture, and construction of affordable housing. Participation requires no special skills but an interest in learning, exploring and sharing in a community setting.

Service Programs are between one to four weeks in length. The number of participants in an Elderhostel Service Program ranges from 10 to 30. Participant fees cover project costs and lectures, as well as room and board. Airfare is included for most international service programs. Accommodations vary according to the location and project. Tuition for service programs is comparable to regular U.S. & Canada and international programs. A share of the program charge is allocated as a donation to the service organization to help with operational expenses. Because Elderhostel and partnering service organizations are public charities exempt under Section 501(c)(3) of the Internal Revenue code, expenses are generally tax-deductible.

According to the IRS Publication 526 (2006), certain rules are applicable for volunteer work travel expenses if listed as a tax deduction. Tax deductions depend on the volunteer organization running the program. Part or all of program fees and travel expenses can be tax deductible. Out-of-pocket expenses are tax deductible when a person serves a qualified organization as a volunteer. Travel expenses are deductible only if

there is no significant element of personal pleasure, recreation or vacation associated with the travel. The volunteer's professional services are not tax deductible as in-kind services.

Boomers: The New Customer Majority

Abraham Maslow summed up the course of human life by saying every infant enters the world with one overriding task: to become ever human, (cited in Wolfe, 2003). He did not mean that infants are not biologically fully human, but rather than they are far from the beingness state that distinguishes us most from other animals: Self-actualization, the most complete expression of humanness. For the first time in history, the majority of adults are in the years of life when self-actualization needs play an ever-expanding role in human behavior and choices they make.

Kressley (1998) and others wrote that the first wave of Baby Boomers, defined as those people born between 1946 and 1965, are healthier, wealthier, and living longer than previous generations. They constitute roughly one-third of the U.S. As the leading edge of this population segment approaches age 65, they will continue to have a significant impact on reshaping the landscape of lifelong learning. To assume that the needs and preferences of yesterday's, or even today's, older adults will be the same as those of future generations would be misleading. Data indicate that tomorrow's older adults will be in better health, have more years of education, and have larger incomes. These characteristics predict a far more active population than has been the case in recent older adult groups. Thirty-seven percent (37%) of Baby Boomers report that continuing education is part of their retirement plan (Wilson, 2006).

For the first time ever, the majority of adults are 40 and older. In year 2000, the New Customer Majority was forty five percent (45%) larger than the 18-39 age group (123 million to 85 million), by 2010 it will be sixty one percent (61%) larger: 138 million to 86 million money-spending consumers (Wolfe, 2003). By 2010, adults 45 and older will outspend younger adults by \$1 trillion (\$2.6 to \$1.6 trillion). The median age of adults will rise year by year over the next ten years (really the next twenty), going from where it is today (around 40) up to the low 50s (Wolfe, 2003).

The sheer numbers of Baby Boomers that are the New Customer Majority have radically changed the rules of marketplace engagement, because its members see life through a different lens than younger consumers who once determined the rules. Analogous to this concept of developmental marketing, the lifelong learning student may see education, service and learning through a new lens, too. Coughlin (2004) summarized his findings:

1. Improved health: The National Long Term Care Survey indicates that chronic disability rates fell forty seven percent (47%) between 1989 and 1994 and that functional problems have generally become less severe for older adults. In 1990, more than seventy two percent (72%) of older adults surveyed assessed themselves in excellent, very good, or good health. Baby boomers are predicted to enjoy better health due to continued improvements in nutrition, fitness, and health care.
2. Increased education: Tomorrow's older adults will be better educated than previous generations. Twice as many young old (60 to 70 years old) will have a college degree--a jump from sixteen percent (16%) in 1994 to about thirty two

percent (32%) by 2019. Even the percentage of adults age 85 and over with a college education will double from about eleven percent (11%) to between twenty percent (20%) and twenty five percent (25%) for the same period.

3. Larger income: Although many older adults may continue to live in poverty, most will be far better off than their grandparents were. Compared to 1960, when more than thirty percent (30%) were below the poverty line, only ten percent (10%) are considered poor today. Moreover, baby boomers will soon be inheriting from their parents anywhere from \$10 to \$14 trillion--the largest transfer of wealth in history. The relative improvement of socioeconomic status and well-being suggests real changes in the lifestyle of older adults. Active engagement will typify healthy aging. If people have good health, a wider range of interests, and greater income with which to pursue those activities, then it is very likely that they will choose to lead more active lives. A recent Wall Street Journal-NBC poll revealed that between sixty two percent (62%) and eighty nine percent (89%) of the next wave of retirees anticipate devoting more time to learning, study, travel, volunteering, and work. Improved well-being overall will raise the expectations of what it means to age for older adults and their adult children. Both will place unprecedented priority on the infrastructure that will facilitate active independent aging and the capacity to provide care for the oldest old. (p. 53-60)

There is emerging evidence of a need for increased understanding and program alternatives for older adults. After “graduating” from a long career, Boomers will have the potential for another 30 years of productivity in some area of their lives. According

to Civic Ventures and Temple University Center for Intergenerational Learning (2002), the following trends were reported:

1. Life is a continuing journey with never-ending opportunities to learn, give and grow.
2. New bridges are being built from generation to generation, from skill to need, from interest to opportunity.
3. Your experience, wisdom and talent will be needed and will be valued.
4. Your freedom and autonomy will not be compromised.
5. You know what you have to offer. We can help you find an outlet.
6. And most importantly: Experiencing the unique satisfaction of “Relationships with a Purpose” need not be gone forever. (p. 12)

Boomers and Work in Retirement

Recently global financial services companies have focused research on the Baby Boomers and their retirement plans. Many Boomers will seek re-education over the next few years, as they retool to take on second careers. Many may have little choice but to work because they have not saved enough to retire. Merrill Lynch and HSBC launched research to better understand why people will work in retirement. The Boomer Project (2006) reported that Merrill Lynch released their “New Retirement” research among adults ages 25-70, with a special focus on Boomers. An interesting finding from the study is that seventy-one percent (71%) of the respondents reported they plan to work in retirement. The important reasons for working in retirement included: Staying mentally active; staying physically active; the money; staying connected with others; health insurance benefits; providing a sense of identity or self-worth; and providing new

challenges. The Boomer Project (2006) also reported that HSBC, another financial services giant, released a survey in which eighty three percent (83%) of U.S. respondents said they'd keep working in some capacity. The reasons reported were: Need the money; mental stimulation; keeping physically active; connecting with others; and having something meaningful or valuable to do with your time.

Boomers and Older Adults: Focus on Brain Health

Boomers are reaching an age group where they may have memory issues. They want to stay healthy and do things that will keep them at the top of their game. For overall brain health, AARP and health experts recommend regular exercise, staying mentally active and eating a balanced diet rich in antioxidants and omega-3 fatty acids. According to Dr. Gary Small, director of UCLA Center on Aging and the Memory and Aging Research Center, there is softer evidence that mental aerobics and brain exercise stave off Alzheimer's and other types of dementia.

Brain training has been widely discussed in recent news reports (Bartholomew, 2007) and the Boomer Project reported that "Brain Health" is the major topic for the year 2007. Since May 2005, Nintendo has sold over 3 million brain training platforms. Met Life health insurer published a 61-page booklet called "Love Your Brain", while Humana plans to offer brain fitness software to millions of aging clients. Happy Neuron.com supplies cranial calisthenics to the Boomer generation that hatched the fitness and nutrition movements. As the Boomers embraced physical exercise and healthy nutrition to keep their bodies fit, so will they adopt tools that will help exercise their brains to prevent cognitive decline related to aging.

According to Merzenich (2007), a professor at the University of California, San Francisco: “The brain is actually revising itself. It is plastically changing itself as one develops new skills and abilities, as one learns new things.” (p. 2) Merzenich, in many ways, turned neuroscience on its head by championing this idea of plasticity. He started a company called Posit Science that developed a computer program called Brain Fitness, commercially available for about \$400. Program users exercise their brain by doing thousands of different mental tasks per hour. The goal is a younger, more active mind. The brain is like plastic; it can change itself physically and functionally at any age. In response to the right exercise or stimuli, neural connections can be rewired and refined, the brain’s gray matter can thicken, and new neurons can be produced. Scientists call this natural adaptive ability “brain plasticity” or “neuroplasticity.” A study published in the *Journal of the American Medical Association* on December 20, 2007, showed that cognitive training still brought benefits five years later. According to Cohen (2005), one of the remarkable findings from modern neuroscience is that when we challenge our minds, get involved in something that really stimulates us, our brains sprout new dendrites. A single brain cell can sprout hundred upon thousand of these dendrites. This is a remarkable capacity of what’s called plasticity or modifiability of the human brain.

According to Goleman (2007), author of *Social Intelligence*, stem cells of the brain manufacture 10,000 brain cells every day of your life. Social interaction helps neurogenesis. The brain rises to the occasion the more it is challenged.

Scientific studies are being conducted in universities that may discover more links to daily cognitive training that benefits the brain and wards off flabby minds. Boomers entering into re-education in institutions of higher education may benefit greatly from

learning new things, “rewiring” their brains, and improving their brain health.

Chapter Summary

Baby Boomers have a reputation for setting trends as they pass through each stage in life (Gartner, 1996). The holistic path of late-life development is not a new idea but a possibility long familiar in the spiritual traditions of the world, which depict later life as a time for the growth of consciousness and wisdom (Moody, 2002). Boomers are ready to become self-actualized and seek meaning in their lives. The demographics and psychographics of Boomers are in alignment for higher institutions to create successful lifelong learning programs, linkages with academic retirement communities, and volunteerism in the context of service learning programs.

The Boomer generation will seek out opportunities that engage them in continuous education for increased skills, knowledge, brain health, and personal fulfillment. University-based educational opportunities that combine lifelong learning with meaningful civic engagement open new doors for exploration and have the potential to change policy.

The economic value of the educational travel niche is a significant factor for higher education institutions to assess and include in revenue producing programs for alumni and development offices. Antiquated views of retirement as a time of limited activity, bingo and bridge are being replaced with a new paradigm of aging, one which accepts and embraces vibrant, healthy, active seniors who want to remain politically active, contribute to society, travel, learn and lead active lives. Educational travel programs have emerged in the last four decades and have grown in size and popularity over the years. Whether the educational travel program is offered through a nonprofit

organization like Elderhostel, a commercial for-profit organization or a higher education institution, educational travel programs are designed and offered to various segments of the population.

Older adults prefer programs that combine, learning, leisure and social interaction into a single experience. As the Boomers begin to retire and have time to travel and learn, it is likely that these programs will grow and expand. Boomers are typically in good health, well educated, active learners, and travelers. Boomers can also provide the needed social capital in the 21st Century in human services, education, health care and community leadership.

The value of combining learning with service programs and educational travel for the lifelong learner who travels with Elderhostel and/or their university alumni associations is a trend worth watching to cultivate and expand programs affiliated with institutions of higher education.

Spiritualized elders will guide the younger through the turmoil of cultural materialism. Earning higher education degrees in social responsibility disciplines can be a step in the evolution of the Baby Boomers to give their time, knowledge and life experience to continue their life journey. Higher education is a major resource for lifelong learners to continue learning, keep brain healthy, and offer re-education for the “second act” of life for many Boomers and older age students.

CHAPTER THREE

Curiouser and curiouser. Stay young at heart and in mind by

flexing your Why? And How?

- Oprah Winfrey

METHODS AND PROCEDURES

Introduction

This descriptive survey researched the preferences for an educational program with a segment of Baby Boomers and older adult learners in traditional lifelong learning programs, and also lifelong learning programs inclusive of service learning. It also investigated why Boomers participate in educational travel programs. In addition, the study surveyed the interest of Boomers and older adult learners to make career changes to improve the quality of life in their community, attend certification training, and/or attend university tuition programs in social responsibility education disciplines. These disciplines include human services, education, arts and culture management, health care and nonprofit community leadership.

The sample populations for this study were selected from Elderhostel National nonprofit educational travel program and The University of Montana Alumni Association databases. Working with the researcher, the Director of Statistical Research for Elderhostel National headquarters and The University of Montana Alumni Association Executive Director (Creswell, 2003) were the gatekeepers and the bridge for access to names and the population to sample the subjects directly.

Gay (1996) indicated: “Descriptive research involves collecting data in order to test hypotheses or answer questions concerning the current status of the subject of the study” (p 14).

A descriptive study determines and reports the way things are. Gay (1996) further stated the second benefit of the descriptive model and reasoning of why it was chosen "...the descriptive method is useful for investigating a variety of educational problems. Typical descriptive studies are concerned with the assessment of attitudes, opinions, demographic information, conditions and procedures" (p. 249). According to Gay (1996), descriptive data are usually collected through a questionnaire survey, interviews, or observation.

Surveys are used to plan and evaluate programs and conduct research when the information needed should come directly from the people (Fink, 1998). The data they provide describe attitudes, values, habits, and background characteristics such as age, health, education, and income. A survey is the preferred type of data collection procedure because it allows for identifying attributes of a diverse population in order to analyze, correlate, and compare variables (Fowler, 1998; Babbie, 1990; Sudman & Bradburn, 1986; Fink & Kosecoff, 1985).

Population and Sample

The population in this study includes leading edge Baby Boomers (ranging in ages 50-60) and older adults (ranging in ages 61-70) who have participated in lifelong learning programs that do not include service learning programs; and also leading edge Baby Boomers and older adults who have participated in lifelong learning programs that include service learning programs. The availability of the sampling frame was limited to mailing lists of potential respondents in this population.

The self-administered questionnaires were mailed to and completed by the respondents themselves. The questionnaire was sent to people who have attended Elderhostel National educational travel programs and The University of Montana Alumni Association travel programs. Elderhostel participants have a reputation for filling out

their questionnaires and participating in research projects (Arsenault, 1998; O'Connor, 1987; Rice, 1986; Roberto & McGraw, 1990; Romaniuk & Romaniuk, 1982). Few research initiatives have been devoted exclusively to the education of older adults in an aging society (Thornton, 1992) and a strong need exists to expand research in this area (Jean, 1994). The University of Montana Alumni Association was selected based upon the willingness to share a sample of alumni to receive the direct mail questionnaire survey. The surveys were coded to keep the data separate.

Jaeger (1997) posited that when fairly large populations are sampled (e.g. populations with 10,000 or more members), the reliability for sample estimates depends far more on the actual size of the sample than on the proportion of the population sampled. Because the data collection costs of a survey were a major budget item, anything that reduced the amount of data required, without affecting the quality of the resulting information, was considered seriously. Choosing the best possible sample method is one important way of increasing the efficiency of a survey, thus reducing costs without sacrificing quality of precision (Jaeger, 1997). This researcher and the Director of Statistical Research at Elderhostel national headquarters selected the mailing list from the Elderhostel database through a sample determined by age and educational travel programs. The sample sizes for this study were: (1) Ages 50-59 – One hundred (100) participants from service learning educational travel programs and five hundred (500) participants from all other educational travel programs; (2) Ages 60-70 – One hundred (100) participants from service learning educational travel programs and five hundred (500) participants from all other educational travel programs.

The University of Montana Alumni Association sample was drawn from the alumni who have participated in their educational travel programs. The University of Montana Alumni

Association staff could not segment the computer database according to ages. Therefore, two hundred (200) participants were surveyed through the selection process of every 4th person listed on mailing labels.

Research Questions

This study addressed the following questions: Into what categories do leading edge Baby Boomers and older adults fit, and what are their preferences in educational programs? What is the potential for lifelong learning institutes and universities to attract this segment of the population to make career transitions to human services, education, and community leadership through certification, training and/or tuition bearing university degree programs? What are the interests and career choices for Boomers and older adults who are interested in taking a job to help improve the quality of life in the community? Would Boomers and older adults be in favor of a grant or tax credit to spend a year in training for community service or actually work in a job in public or community service?

Questionnaire Survey Instrument

The typologies section was taken from an extensive survey that was designed, refined, implemented, and published in the doctoral dissertation of Dr. Nancy Arsenault, Director, Institute of Tourism, Royal Roads University. Oral and written permission was given to this student to use any part of the published survey by Dr. Arsenault on January 12, 2005. Arsenault's research (1998) also defined the participant typologies:

- (1) Activity Oriented. The Activity-Oriented will only register in programs that include some form of physical activity. The Activity-Oriented person wants to be outdoors, explore the natural environment, and be actively engaged in their learning. This could be golf, hiking, canoeing or walking through nature

to bird watch. This type of person enjoys the outdoors, wants to learn in the natural environment, and is not attracted to programs where the entire learning component is perceived to be in a classroom.

- (2) **Experimenter.** The experimenter is the novice participant who is investigating the educational program by trying a variety of programs to see where their interest lies. The experimenter's first experience is close to home (one tank of gas), and the experimenter selects a program based on: (a) enrollment in a course with a physical activity option because of fear over entering a setting which is too academic or (b) enrollment in an academic course in which the enrollee possesses some pre-requisite knowledge.
- (3) **Content-Committed.** Subject is everything. They are willing to travel anywhere to find a site with a program that supports their learning interests in a particular subject area. Good instruction at a university level is critical, and this person is willing to wait until the preferred subject comes up rather than attend a site outside the preferred subject area. Location is not as important.
- (4) **Adventurer.** The adventurer is willing to go anywhere and try anything. The adventurer is looking for new experiences in learning and socializing and will even sacrifice accommodation preferences just to have a new experience. They select a region, area or city desirable to explore. The type of educational program is not a priority consideration. What draws this person to a given site is the opportunity to see, explore and learn about a new area. The primary interest is to learn about the area and when possible will extend the visit to continue exploring.

- (5) Opportunist. This person is different and can be ostracized by the regular participants. The opportunist enrolls not for reasons related to the educational program, rather for some personal reason like taking advantage of inexpensive meals and accommodations while visiting an area.
- (6) Geographical Explorer. They select a region, area or city they would like to explore. The type of Elderhostel program is not a priority consideration. What draws this person to a given site is the opportunity to see, explore and learn about a new area. The primary interest is to learn about the area and when possible, geographical explorers will extend their visit to continue exploring.

The researcher of this study added a new typology to the participant typologies:

- (7) Service Learner. This person is a socially responsible person committed to helping people through volunteering on a project while studying a topic and combining learning with service. Service learning initiatives involve students in course-relevant activities which address the real human, safety, educational, and environmental needs of the community. This person also volunteers time, knowledge and skills to accomplish a task that involves them in experiential learning. (Astin, 1998, p. 254)

The Service Learning section questions on the survey were from the national Met Life/Civic Ventures “New Face of Work Survey” June 2005. The research by Princeton Survey Research Associates International and the findings were based on 1,000 national telephone interviews. This researcher added the question regarding the respondent’s

willingness to attend a university tuition program to take courses in human service disciplines to change careers in mid-life.

Procedures

The researcher targeted a large sample of people who have participated in regular lifelong learning programs and those who have participated in service learning programs. A sample of 1200 educational travel participants ages 50-70 was randomly selected from the database of Elderhostel, Inc., a national educational nonprofit and the largest educational travel nonprofit in the U.S. A selection of 200 educational travel participants was drawn from the database of The University of Montana Alumni Association. The University of Montana Alumni Association computer system was not programmed for extracting a sample by ages, so the sample population was taken from a list of past participants of educational travel programs. The gatekeepers for this study were the Director of Statistical Research of Elderhostel National and The University of Montana Alumni Association Executive Director.

This researcher provided the Elderhostel National office in Boston, MA, with bulk copies of the direct mail package for the mass mailing. The direct mail package included: the cover letter from Elderhostel Director of Statistical Research, the cover letter from this researcher, the 4-page survey, and a prepaid upon return envelope to the researcher through The University of Montana. Through their computer database, they labeled the direct mail package and mailed them to a random sample of people ages 50-70 years old throughout the United States. The timelines were set for a 4-6 week period for return of the surveys to this researcher by March 8, 2006. The surveys were mailed via U.S. mail using the proprietary mailing list of the institutions that agreed to cooperate with the author of this study. This survey distribution and response timeframe was conducted during a four to six week time frame.

The University of Montana Alumni Association Executive Director approved the final survey and provided a cover letter. He directed his staff to provide this researcher with a population sample mailing list of alumni educational travelers. The researcher then completed the direct mail survey package for bulk mailing, and it was mailed from The University of Montana Alumni Association.

Treatment of the Data

The use of descriptive statistics is fundamental to all research (Arsenault, 1998). Dr. John Tukey, a pioneer in exploratory data analysis, taught that seeing may be believing or disbelieving, but above all data analysis involves visual, as well as statistical understanding. Tukey taught that by taking samples of a product or of public opinion, a collection of data points is amassed. If only two numbers describe each observation, then that information can be plotted on a graph to see if the points reveal some relationship between the two quantities. Friedman (2002) wrote:

If there ever was a tool that could stimulate the imagination and profit from the intuition and creativity of John Tukey, it was computer graphics. John always saw graphics as being central to exploratory data analysis: "Since the aim of exploratory data analysis is to learn what seems to be, it should be no surprise that pictures play a vital role in doing it well. There is nothing better than a picture for making you think of questions you had forgotten to ask even mentally. (p. 1629)

Exploratory Data Analysis (EDA) was initially promoted by few statisticians, but in recent years it has grown in acceptance. A large part of this growth is based on availability of desktop computers and the explosion of data for which traditional statistics is just not suitable. Desktop computers have also made it possible to develop new

graphical methods that support the EDA philosophy in strikingly effective fashion. EDA starts instead from the data and asks what patterns, relationships, or trends they might hold. As defined originally by Dr. John Tukey, EDA emphasizes data display, finding simple functional descriptions of patterns in the data, and examining the residuals for evidence of deeper patterns or interesting exceptions. Unlike traditional statistics, EDA acknowledges that data are often heterogeneous, and provides effective tools for identifying and isolating extraordinary values and separate subgroups. Computer graphics have been instituted to compare specific details of the sample population including: gender, type of program, level of education, stage of retirement, and academic and professional career choices.

Exploratory data analysis (EDA) is oriented toward the future, rather than the past. The data can be utilized to understand, rather than summarize. This type of analysis is important in research and a good feel for the data is invaluable. The analysis can be obtained by graphical techniques. Graphs give information that no number can replace. EDA recognizes the reliance on the human ability to recognize patterns and to compare.

Chapter Summary

This descriptive study measured the subjects and established the associations between the variables using cross tabulations, relative frequencies and differences between means. Variables of interest were determined through cross-sectional study.

The study compared typologies of leading edge Boomers and older adult learners in Elderhostel programs and The University of Montana Alumni Association in their choices of educational programs. It also looked at the academic and professional interests of leading edge

Boomers and older adults, as well as their interest to make a career change in mid-life and work in a job to help improve the quality of life in their community.

The study also included investigations of the interest of leading edge Boomers and older adults to attend university tuition programs to gain credentials in social responsibility disciplines, including human services, education and community leadership.

CHAPTER FOUR

Learn from yesterday, live for today, hope for tomorrow.

The important thing is not to stop questioning.

- Albert Einstein

RESULTS

The purpose of this research was to ascertain typologies of leading edge Baby Boomers and older adults in educational travel programs and the potential links to lifelong learning institutes and universities to attract this segment of the population to make career transitions to social responsibility disciplines through training and/or tuition bearing university degree programs. The social responsibility disciplines include human services, education, healthcare, arts and culture, environmental and nonprofit community leadership. Additional questions were: (a) Would you be interested in taking a job to help improve the quality of life in the community and what would it be? (b) Would you favor a grant or tax credit to older Americans who spend a year in training for community service or actually work in a job in public or community service?

The sample populations for this study were selected from the database of participants of Elderhostel National educational travel programs and participants of The University of Montana Alumni Association educational travel programs. A sample of 1200 participants ranging in age from 50-70 in traditional programs and service learning programs were randomly selected from the Elderhostel database. Each person received a direct mail survey with cover letters and return envelopes from the Elderhostel Director of Statistical Research and this researcher (See Appendix A).

The University of Montana Alumni Association also provided a list of alumni (200) who have participated in educational travel programs. The selection process used was to mail survey packages to every fourth person on the list. Computer segmentation by age could not be provided, so the results of the data were based on participants of the educational travel programs.

A total n=515 responses were received from the sample of N=1200 Elderhostel participants. Survey responses were received from every state in the U.S., including Alaska and Hawaii. This researcher paid for the outgoing mailing and the incoming mail returns for the surveys from the respondents to the researcher.

A total of n=51 responses were received from the sample of N=200 participants from The University of Montana alumni who have participated in educational travel programs. This researcher paid for the incoming mail return of the surveys from the respondents to the researcher.

Presentation of Data

This research reflected data in the following major categories: (a) reasons for participation in educational travel programs; (b) typologies of participants; (c) career choices; (d) jobs to improve quality of life in community; (e) university or lifelong learning institute training to work in human service work; (f) willingness to change careers to human services; (g) pay tuition for university classes for career transition to human service, education and community leadership positions, and (h) tax credit to spend a year in training to work in public service.

Category A Reasons for Participation in Educational Travel Program

Table 1

Educational Travel Program: Primary Reason to Participate

	<u>Elderhostel National Respondents</u>	<u>The University of Montana Alumni</u>
	(n=515)	(n= 51)
Educational Experience	48%	37%
Recreation/Leisure Activity	20%	17%
Vacation	17%	27%
For Service Learning	9%	5%
To Socialize	2%	9%
For Volunteering	4%	5%
Total	100%	100%

Table 1 illustrates the primary reasons that the respondents participated in educational travel programs. *Educational Experience*, the first choice of both Elderhostel participants and The University of Montana Alumni, was the major reason to participate in an educational travel programs. The complete lists of comments from respondents for each category are documented in Appendix C

Coding Categories of Educational Programs:

Key Descriptors from Synthesis of Respondents' Comments

Choice of Educational Programs as an "Educational Experience"

1. Travel to international countries and throughout the United States to study foreign languages, history, arts, culture, music, food, nature, architecture, digital photography, archeology, birding, fly-fishing, whale watching, watercolor, trains & railroads, religion, snorkeling, wineries, wild horses, and golf.
2. Transportation modes included airplanes, train rides, ocean voyages, bike tours, rafting, hiking, barges, river cruises, canoeing, and buses.
3. Socialization and sense of community through travel with the educational institutions with groups of like mind, smart people, families, friends traveling with new and old friends, women getting their husbands to travel with them.

Choice of Educational Program as "Recreation or Leisure"

1. Travel to international countries and throughout the United States to enjoy getting away, horse racing, lighthouses, snow skiing, hiking, geology, natural history, tennis, golf, traveling on steamboats, the space program, music, birding, whale watching, watercolor, and warm weather.
2. Transportation modes included airplanes, train rides, ocean voyages, bike tours, rafting, hiking, barges, river cruises, canoeing, steamboats, and buses.
3. Socialization and sense of community through travel with the educational institutions with groups of like mind, smart people, families, friends traveling with new and old friends, women getting their husbands to travel with them.

Choice of Educational Program as "Vacation"

1. Travel to international countries and throughout the United States to enjoy canoeing, biking, dancing, music, birding, fall foliage, have fun and challenge the senses.
2. Socialization and sense of community through travel with the educational institutions with groups of like mind, smart people, families, friends traveling with new and old friends, women getting their husbands to travel with them.

Choice of Educational Program as “Service Learning”

1. Travel to international countries and throughout the United States to restore lighthouses and national parks; teach kids on Native American reservations; environmental issues; restoring aircraft; working with animals and zoos; tutoring kids 1-to-1; teaching English as a second language; restoring native plants; birding; paleo digs; historical preservation; and “payback” to Elderhostel.

Choice of Educational Program for “Volunteering”

1. Travel in the United States to volunteer at Tucson Gem Show; Lewis & Clark journey; national park restoration; teaching Native American kids.

Choice of Educational Program to “Socialize”

1. Travel in the U.S. and international countries to have fun; be with friends; play golf; snow ski; enjoy deserts; birding; learning “CSI” forensics; holidays and fun; family and intergenerational travel, and sailing.

Figure 1. Elderhostel Participants: Reason to Participate in Educational Travel Program
(n=515)

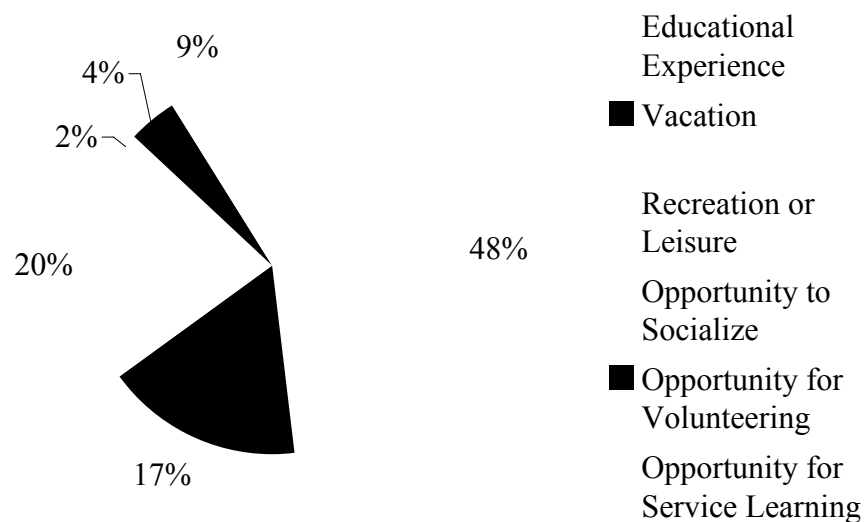


Figure 1. Respondents were directed to check only one answer to the question of what they think of when being in an education program. Almost half of respondents chose educational experience, forty eight percent (48%) of respondents, 247 people, almost as many as all other choices together. Twenty percent (20%) of respondents, 103 respondents, checked recreation or leisure activity. Seventeen percent (17%) of respondents, 88 respondents, chose vacation. Nearly nine percent (9%), 46 respondents, chose an opportunity for service learning. Almost four percent (4%), 21 people, chose an opportunity for volunteering. Finally, over two percent (2%), 15 respondents, chose an opportunity to socialize. Education linked with experiential

learning through travel, vacation, and recreation or leisure activity are the major reasons that the respondents from the Elderhostel sample think of an educational program in this context.

Figure 2. The University of Montana Alumni: Reason to Participate in Educational Travel Program (n=51)

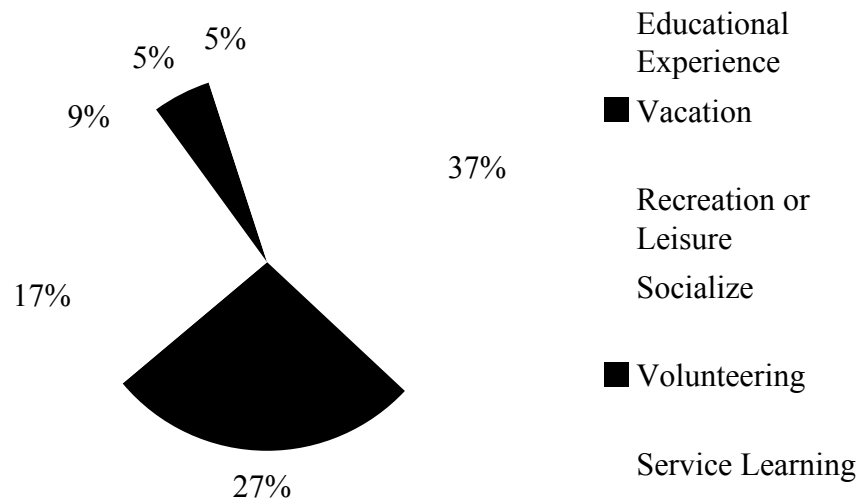


Figure 2. Thirty seven percent (37%), 22 respondents, chose educational experience. Twenty seven percent (27%), 14 respondents, checked vacation. Seventeen percent (17%), 17 respondents, chose recreation or leisure activity. Five percent (5%), 3 respondents, chose an opportunity to socialize. Nine percent (9%), 3 respondents, chose an opportunity for service learning. Five percent (5%), 3 respondents, chose an opportunity for volunteering. Education linked with experiential learning through travel, vacation and recreation or leisure activity are the major reasons that the respondents from The University of Montana Alumni sample think of an educational program in this context.

Category B Typologies of Participants

Figure 3. Typologies of Elderhostel Participants (n=515)

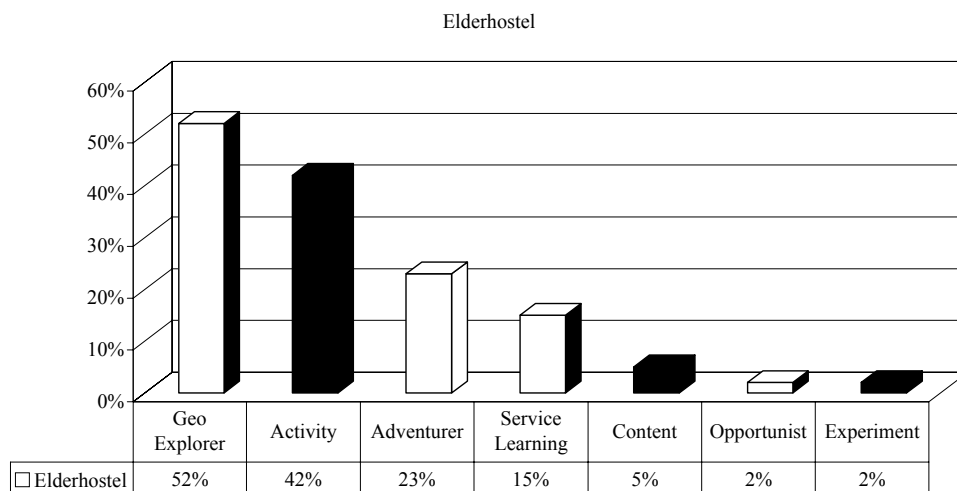


Figure 3. Arsenault’s research defined the typologies used in the questionnaires/surveys sent to the respondents. Descriptors in this figure and those following are drawn from the literature review and survey language sent to the respondents.

Each respondent completed a Likert scale (1-5) indicating how similar the respondent is to the description. The large majority of respondents (n=509) ranked geographic explorer at 4 and 5 “sounds like me” at thirty five percent (35%) and fifty two percent (52%) respectively. These respondents love exploring and look for a program that takes them to a part of the world to learn about the local area, history, people, and customs.

The activity oriented (n=512) respondents also ranked at 4 and 5 “sounds like me” at twenty eight percent (28%) and forty two percent (42%) respectively. These respondents prefer a program where the learning is combined with some form of physical activity, preferably

outdoors. They avoid programs where they think most of the learning will take place sitting in a classroom.

The adventurer is willing to go anywhere and try most anything to enjoy new experiences in learning and socializing. The amenities and accommodations are not as important as participating in an interesting program. Very similar to the geographic explorer, the adventurer (n=514) respondents ranked at 4 and 5 “sounds like me” at thirty percent (30%) and twenty three percent (23%) respectively.

The service learner is committed to studying a topic and combining the learning with service and volunteering. The distribution of respondents’ (n=514) answers ranked in an even distribution from 1 “that’s not me at all” to 5 “sounds like me.”

Table 2

Service Learner Typology: Distribution from 1 “That’s not me at all” to 5 “Sounds like me.”

1	16%
2	25%
3	27%
4	17%
5	15%
Total	100%

The content-committed is passionate about studying a favorite subject and only considers registering for a program that can advance knowledge in this area. The distribution of respondents’ (n=515) answers ranked at 1 and 2 “that’s not me at all” at twenty seven percent

(27%) and twenty eight percent (28%) respectively showing lesser interest in this typology as a characteristic of what type of person they are.

The opportunist is not particularly interested in attending classes, but is attracted to Elderhostel programs because of affordable accommodations and meals. The respondents (n=512) ranked at 1 to 2 “that’s not me at all” at forty seven percent (47%) and twenty eight percent (28%) respectively, showing very little interest in this typology as a characteristic of what type of person the respondent is.

The experimenter still feels like a newcomer to educational programs and is somewhat nervous about going back to school. To feel more comfortable the experimenter looks for a familiar subject area in a program close to home. The respondents (n=514) ranked at 1 to 2 “that’s not me at all” at sixty three percent (63%) and twenty five percent (25%) respectively, showing very little interest in this typology as a characteristic of what type of person they are.

Figure 4. Typologies of The University of Montana Alumni (n=51)

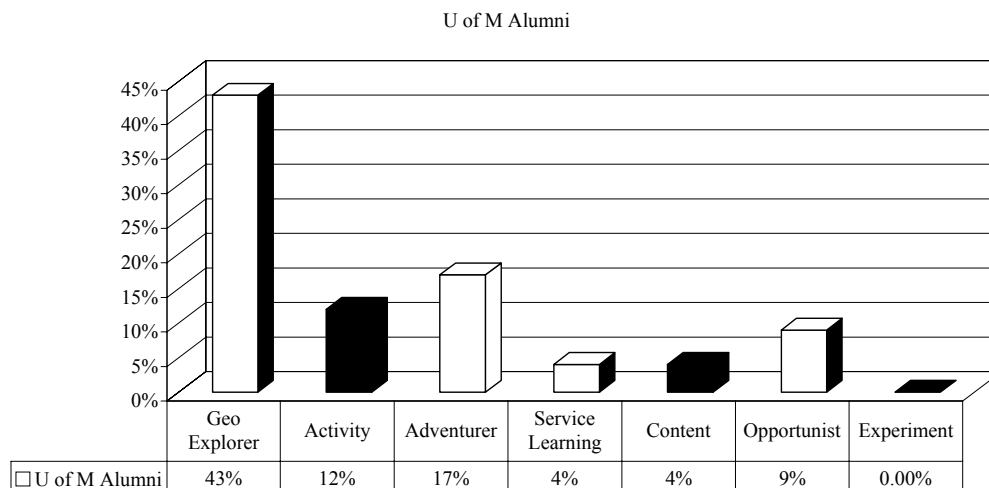


Figure 4. Each respondent completed a Likert scale (1-5) indicating how similar he/she is to the description. The large majority of respondents (n=47) ranked geographic explorer at 4

and 5 “sounds like me” at thirty two percent (32%) and forty three percent (43%) respectively. These respondents love exploring and look for a program that takes them to a part of the world to learn about the local area, history, people, and customs.

The activity oriented (n=49) respondents ranked at 4 and 5 “sounds like me” at thirty five percent (35%) and twelve percent (12%) respectively. These respondents prefer a program where the learning is combined with some form of physical activity, preferably outdoors. They avoid programs where they think most of the learning will take place sitting in a classroom.

The adventurer is willing to go anywhere and try most anything to enjoy new experiences in learning and socializing. The amenities and accommodations are not as important as participating in an interesting program. Very similar to the geographic explorer, the adventurer (n=47) respondents ranked at 4 and 5 “sounds like me” at thirty percent (30%) and seventeen percent (17%) respectively.

The service learner is committed to studying a topic and combining the learning with service and volunteering. The distribution of respondents’ (n=49) answers ranked in a more even distribution from 1 “that’s not me at all” to 5 “sounds like me.”

Table 3

Service Learner Typology: Distribution from 1 “That’s not me at all” to 5 “Sounds like me.”

1	29%
2	20%
3	35%
4	12%
5	4%

Total 100%

The content-committed is passionate about studying a favorite subject and only considers registering for a program that can advance knowledge in this area. The distribution of respondents' (n=49) answers ranked at 1 to 2 "that's not me at all" at twenty percent (27%) and thirty one percent (31%) showing lesser interest in this typology.

The opportunist was not particularly interested in attending classes, but is attracted to Elderhostel programs because of affordable accommodations and meals. The respondents (n=49) ranked at 1 to 2 "that's not me at all" at forty seven percent (47%) and twenty eight percent (28%) respectively, showing very little interest in this typology as a characteristic of what type of person they are.

The experimenter still feels like a newcomer to educational programs and is somewhat nervous about going back to school. To feel more comfortable they look for a familiar subject area in a program close to home. The respondents (48) ranked at 1 to 2 to 3 "that's not me at all" at forty six percent (46%), seventeen percent (17%), and twenty three percent (23%) respectively, showing very little interest in this typology as a characteristic of what type of person they are.

Category C Career Choices - Baseline Demographics that relate to this section:

Figure 5. Elderhostel Participants and The University of Montana Alumni: Age Distribution

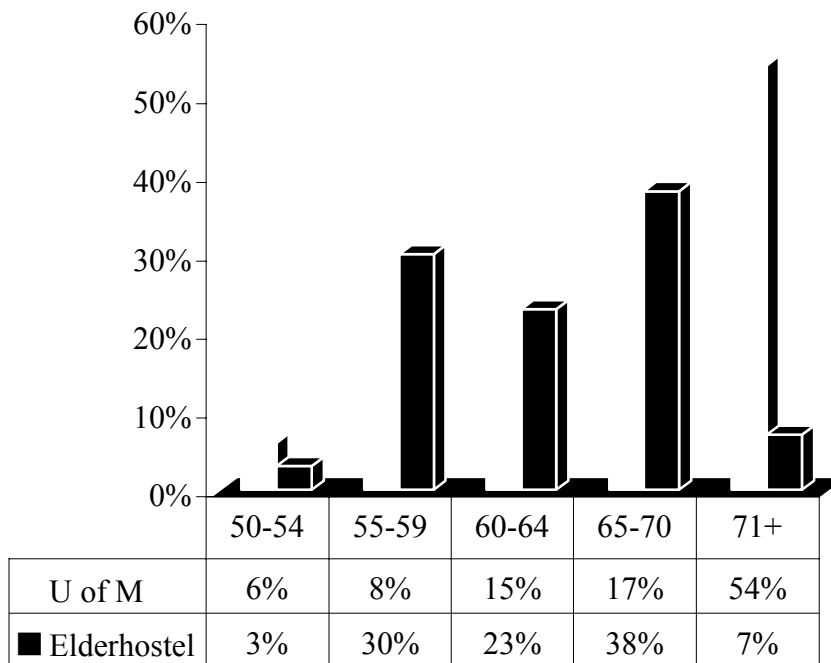


Figure 5. These age groupings are for baseline reference and comparisons.

Figure 6. Elderhostel Participants and The University of Montana Alumni:
Gender Distribution

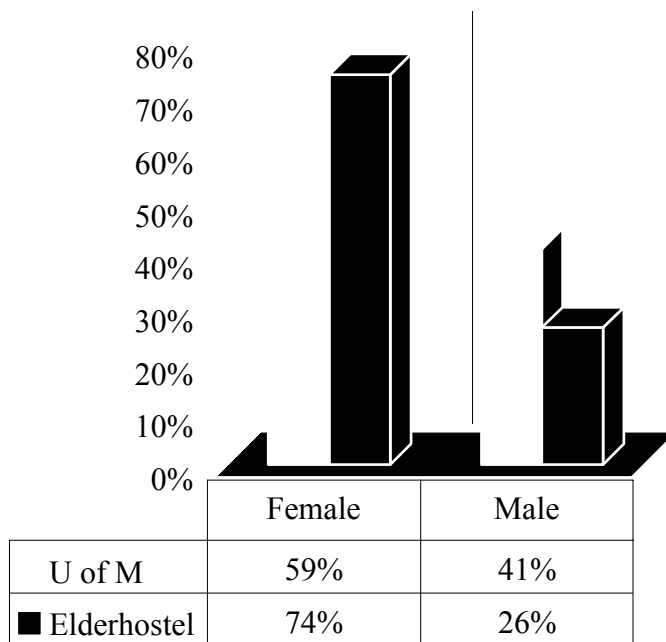


Figure 6. The gender demographics are for baseline reference and comparisons.

Table 4 Baseline information on education level of respondents.

Last Class Completed in School

	<u>Elderhostel National (n=515)</u>	<u>The University of Montana Alumni (n=51)</u>
High School Graduate	1%	0%
College Work, no degree	2%	10%
College Graduate	32%	49%
Post Graduate	65%	41%

Table 4 displays baseline information on education levels to use for comparison of

respondents interest in future career changes and higher education courses. The respondents overwhelmingly show great affinity to education with high percentages of college graduate and post graduate degrees.

Figure 7. Elderhostel Participants and The University of Montana Alumni: Current Employment Status



Figure 7. Baseline information for comparisons for interest in future work.

Figure 8. Elderhostel Participants and The University of Montana Alumni: Retirement from a Previous Career

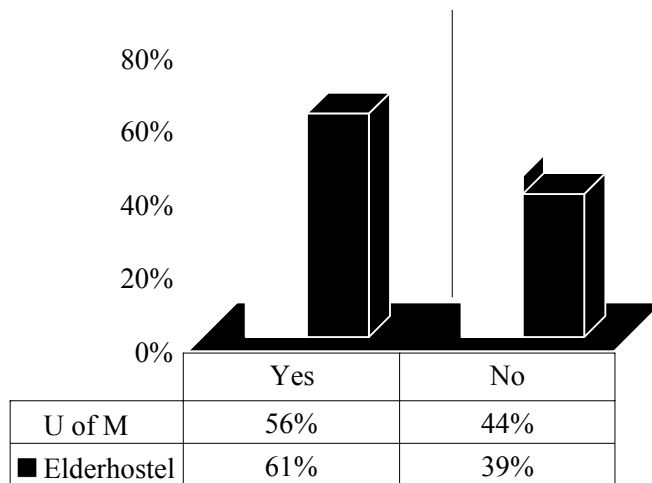


Figure 8. This figure provides the baseline for comparisons for interest in work in social responsibility areas.

Figure 9. Elderhostel Participants: Past Work (n=515)

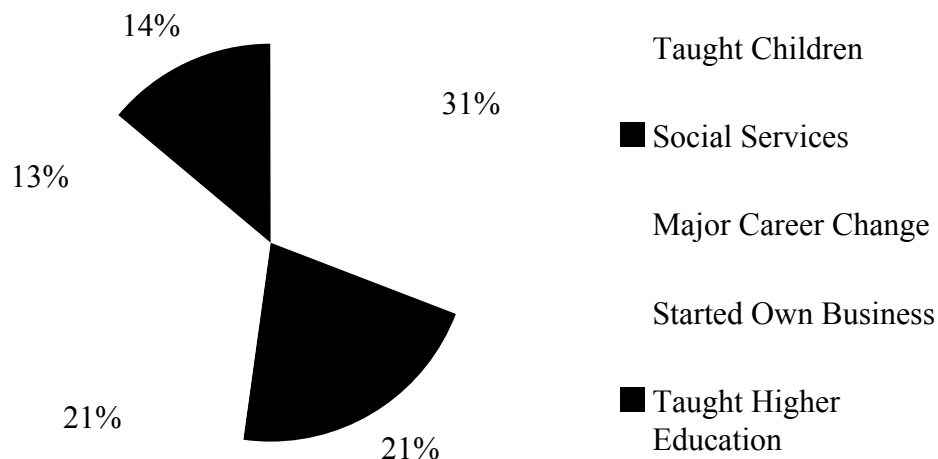


Figure 9. This section to ascertain the interest of respondents in careers in human service and service learning looked first at the baseline of the frame of reference of each respondent. Each respondent checked each category in a list that applied to him/her. Thirty one percent (31%) of respondents, 318 people, said that they taught children either as a job or on a volunteer basis. Equally important, twenty one percent (21%) of respondents, 221 people, responded that they made a major career change, and twenty one percent (21%), 221 respondents, worked in social services such as jobs that help the poor, the elderly or other people in need. At the bottom

of the scale, almost fourteen percent (14%) of respondents, 142 people, said that they taught young adults at the college level, including community colleges. Almost thirteen percent (13%), 132 respondents, said that they started their own business.

Figure 10. The University of Montana Alumni: Past Work (n=51)

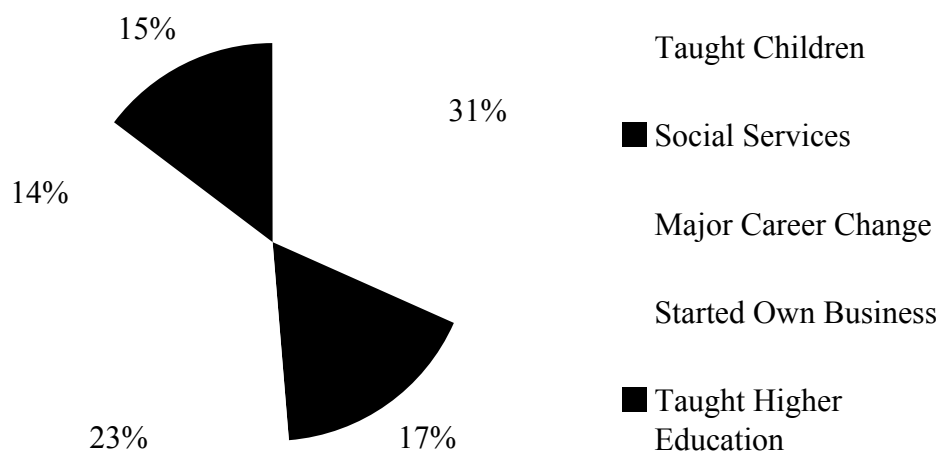


Figure 10. This section sought to ascertain the interest of respondents in careers in human service and service learning looked first at the baseline of the frame of reference of each respondent. Each respondent checked each category in a list that applied to the respondent. Thirty one percent (31%) of respondents, 15 people, said that they taught children either as a job

or on a volunteer basis. Twenty three percent (23%), 23 respondents, responded that they made a major career change. Seventeen percent (17%), 17 respondents, worked in social services such as jobs that help the poor, the elderly or other people in need. At the bottom of the scale, almost fourteen percent (15%), 15 respondents, said that they taught young adults at the college level, including community colleges. Almost thirteen percent (14%), 14 respondents, said that they started their own business.

Category D Interest in Jobs that Improve Quality of Life in the Community

Figure 11. Elderhostel Participants: Interest in Taking Job to Improve the Quality of Life in Community (n=1034)

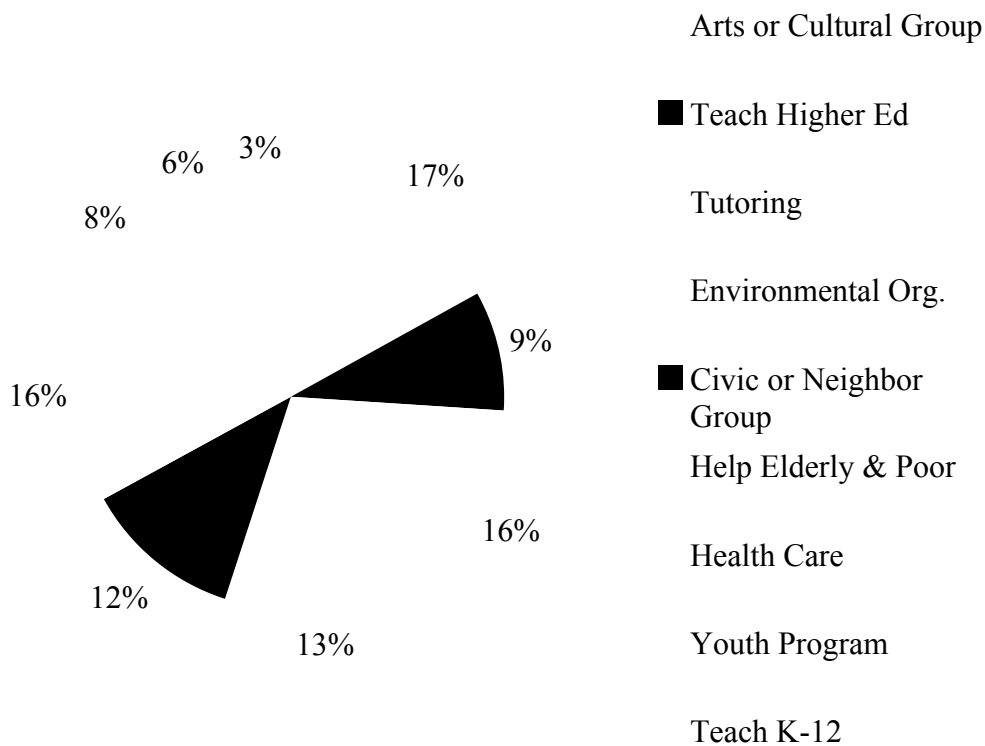


Figure 11. This question sought to ascertain the interest of respondents in changing careers from business, professional or vocational types of careers to a career in human service,

education and community to help improve the quality of life in his/her community. Each respondent checked each category in a list that applied to him/her. Almost seventeen percent (17%), 201 respondents, said that they would be interested in an arts or cultural group, such as a museum, theater or music group. Sixteen percent (16%), 196 respondents, responded that they would be interested in a program that helps the elderly, the poor, or other people in need. Equally of interest, sixteen percent (16%), 194 respondents, would be interested in tutoring or other educational programs such as after-school programs or Sunday school classes. In the middle of the spectrum, thirteen percent (13%), 160 respondents, would be interested in a job with an environmental organization. Twelve percent (12%), 145 respondents, would be interested in a neighborhood or civic group such as a neighborhood association or community board. Nearly nine percent (9%), 106 respondents, would be interested in teaching part-time or full time at a community college or university. Eight percent (8%), 102 respondents, would be interested in a job at a hospital or health organization including those that fight particular diseases. At the bottom of the scale, six percent (6%), 67 respondents, said that they would be interested in a job at a youth program, such as a day care center, scouts or little league. Only three percent (3%), 37 respondents, would be interested in teaching full time in grades K-12.

Figure 12. The University of Montana Alumni: Interest in Taking Job to Improve the Quality of Life in Community (n=84)

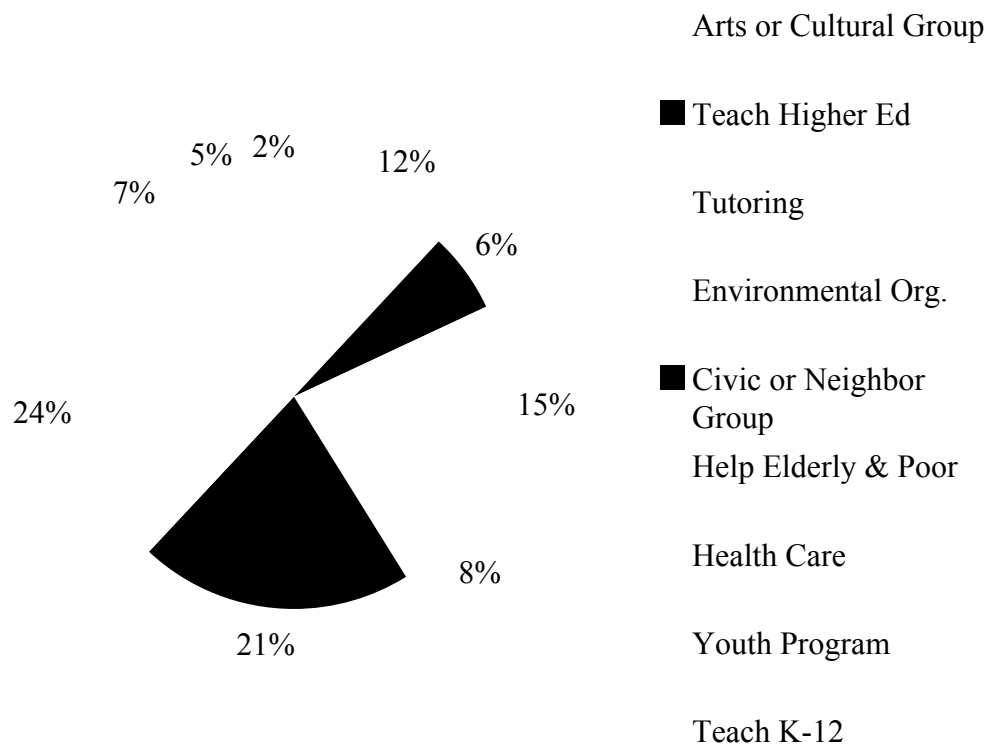


Figure 12. This question sought to ascertain the interest of respondents in changing careers from business, professional or vocational types of careers to a career in human service, education and community to help improve the quality of life in his/her community. Each respondent checked each category in a list that applied to him/her. Twenty one percent (21%), 20 respondents, responded that they would be interested in a program that helps the elderly, the poor, or other people in need. Twenty percent (20%), 17 respondents, would be interested in a job working for a neighborhood or civic group such as a neighborhood association or community

board. In the middle of the spectrum, fifteen percent (15%), 13 respondents, would be interested in tutoring or other educational programs such as after-school programs or Sunday school classes. Twelve percent (12%), 10 respondents, said that they would be interested in an arts or cultural group, such as a museum, theater or music group. Seven percent (7%), 6 respondents, would be interested in a job at a hospital or health organization including those that fight particular diseases. At the other end of the scale, six percent (6%), 5 respondents, would be interested in teaching part-time or full time at a community college or university. Five percent (5%), 4 respondents, said that they would be interested in a job at a youth program, such as a day care center, scouts or little league. Only two percent (2%), 2 respondents, would be interested in teaching full time in grades K-12.

Category E Interest in University or Lifelong Learning Institute Training to Work in Social Responsibility Areas, including Human Services, Education, and Health Care

Figure 13. Elderhostel Participants (n=503) and The University of Montana Alumni (n=47): Interest in University or Lifelong Learning Institute Training to Work in Schools or Human Services

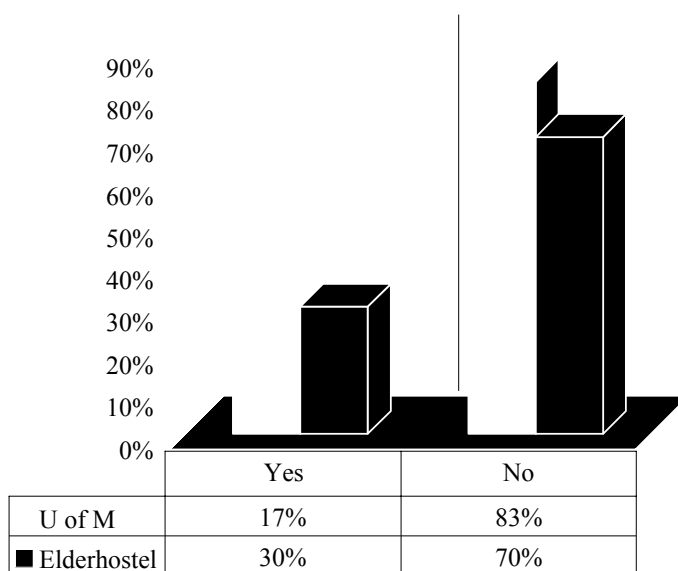


Figure 13. Of key interest to universities and LLI's, thirty percent (30%), 152 respondents, of Elderhostel programs expressed interest in getting training for work in human services. Seventy percent (70%), 351 respondents, did not express interest in getting training for human services work. Seventeen percent (17%), 8 respondents, of The University of Montana Alumni expressed interest in getting training at a university or Elderhostel Lifelong Learning Institute (LLI) to prepare for work in schools or social services. Eighty three percent (83%), 39 respondents, did not want to get any training for work in human services.

Table 5 illustrates the segmentation by age and the interest of Elderhostel participants (n=152) to get training at a university or Elderhostel Lifelong Learning Institute to prepare for work in social responsibility areas. Over 50% of the respondents are in the Baby Boomer age range, a significant finding in this category.

Table 5 Elderhostel Participants' Interest in Training for Social Responsibility Work

<u>Participants</u>	<u>Age</u>	<u>Interest in Training</u>
n=6	50-54	4%
n=59	55-59	39%
n=31	60-64	21%
n=39	65-70	25%
n=17	71+	11%

Table 6 illustrates the segmentation by age and the interest of The University of Montana Alumni participants (n=8) to get training at a university or Lifelong Learning Institute to prepare for work in social responsibility areas.

Table 6 The University of Montana Alumni Interest in Training for Social Responsibility Work

<u>Participants</u>	<u>Age</u>	<u>Interest in Training</u>
n=0	50-54	0%
n=1	55-59	12.5%
n=2	60-64	25%

n=0	65-70	0%
n=5	71+	62.5%

Category F Willingness to Change to Career in Social Responsibility Areas

Figure 14. Elderhostel Participants (n=452) and The University of Montana Alumni (n=39): Willingness to Change to Career in Social Responsibility Areas

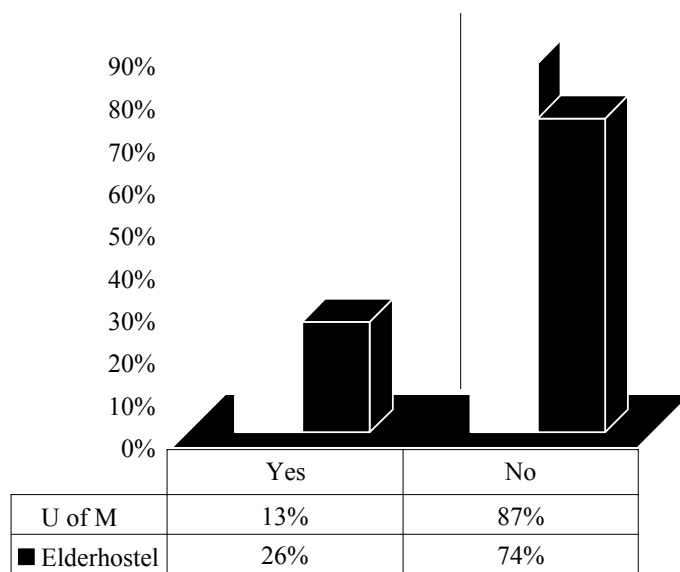


Figure 14. The Elderhostel participants displayed interest in their willingness to change to a career in social responsibility areas. The University of Montana Alumni displayed some interest in their willingness to change to a career in social responsibility areas.

Category G Financial Commitment to Higher Education

Figure 15. Elderhostel Participants (n=479) and The University of Montana Alumni (n=42): Pay University Tuition for Degree in Social Responsibility Disciplines

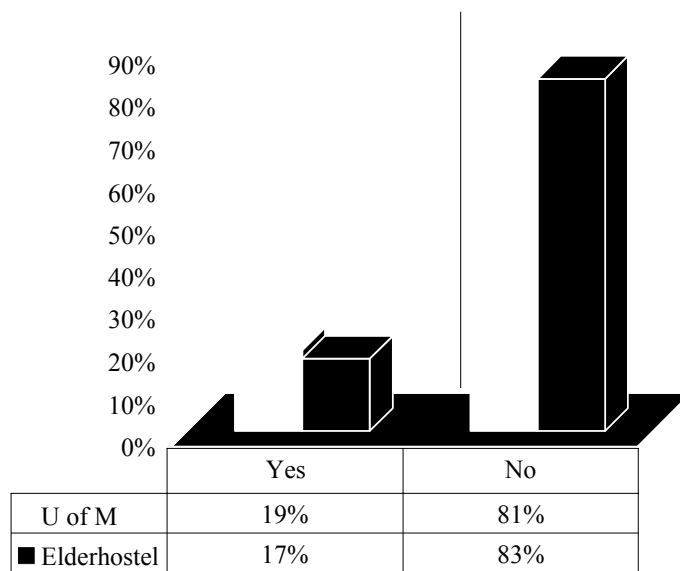


Figure 15. The population sample of this study was chosen because of the existing relationship and affinity to education through participation in The University of Montana Alumni and Elderhostel educational travel programs. The interest and the potential for the subjects to return to school in mid-life or older is evident in this figure.

Table 7 illustrates the interest of Elderhostel participants in going to a university and paying tuition to take classes to obtain a degree in social responsibility work, including human services, education, social services and health care (n=85).

Table 7 Interest of Elderhostel Participants to Pay Tuition for a Degree in Social Responsibility

<u>Participants</u>	<u>Age</u>	<u>Will Pay Tuition</u>
n=15	50-54	17%
n=30	55-59	34%
n=16	60-64	19%
n=21	65-70	26%
n=3	71+	4%

The majority of the respondents in this sub-segmentation are willing to pay tuition to attend a university to gain the credentials to make the transition from a career in business, professional or vocational type of career to a career in social responsibility areas, including human services, education and community leadership. The majority of these respondents are in the leading edge Baby Boomer age range of interest to higher education institutions.

Table 8 illustrates the interest of University of Montana Alumni in going to a university and paying tuition to take classes to obtain a degree in social responsibility work, including education, social services and health care. The majority of the respondents in this sub-segmentation are willing to pay tuition to attend a university to gain the credentials to make the transition from a career in business, professional or vocational type of career to a career in human service, education and community leadership (n=48).

Table 8

Interest of The University of Montana Alumni to Pay Tuition for a Degree in Social Responsibility Disciplines

<u>Participants</u>	<u>Age</u>	<u>Will Pay Tuition</u>
(n=3)	50-54	6%
(n=4)	55-59	8%
(n=7)	60-64	15%
(n=8)	65-70	17%
(n=26)	71+	54%

Because of the high number of older adults who have participated in The University of Montana Alumni educational travel program, the sample is skewed to the oldest age segment. However, the percentages of people in the leading edge Baby Boomer segments are willing to pay tuition for a degree in social responsibility areas, although the actual number of respondents are lower than for the older adult segments.

Figure 16. Elderhostel Respondents' Interest in Paying Tuition for Higher Education Degree and Their Preference of Educational Programs

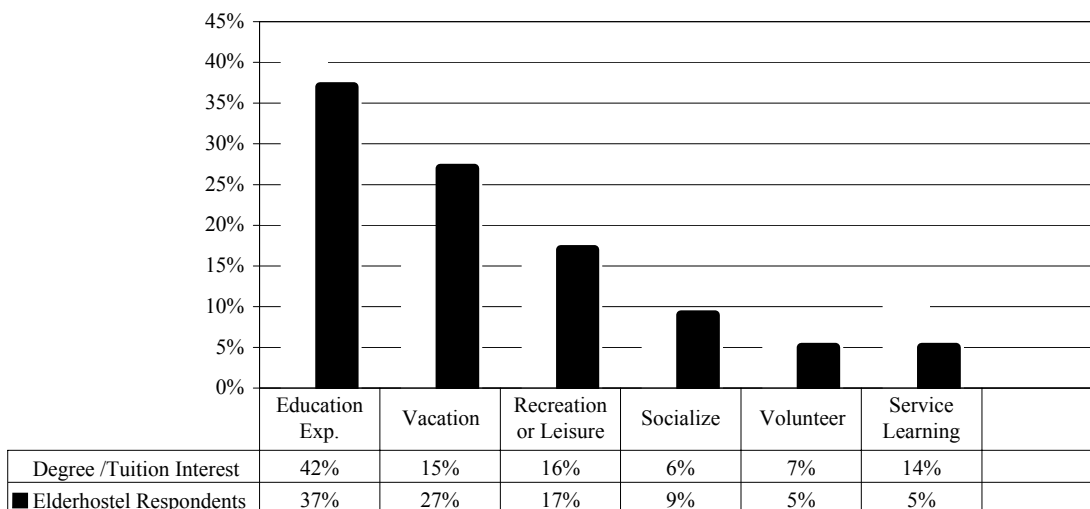


Figure 16. A total of Elderhostel five hundred fifteen respondents (n=515) responded to the following question: “When you think of being in an educational program, do you think of it primarily as an educational experience, a vacation, a recreation or leisure activity, an opportunity to socialize, an opportunity for volunteering, or an opportunity for service learning?” Eighty (81) respondents (n=81) answered “yes” to the question “Would you be willing to pay university tuition to change to a career in a social responsibility discipline?” This cross tabulation illustrates interest and the potential for course development in the areas of experiential education, learning vacations, service learning and volunteering, recreation and leisure for future planning in higher education.

Figure 17. The University of Montana Alumni Respondents' Interest in Paying Tuition for Higher Education Degree and Their Preference of Educational Programs

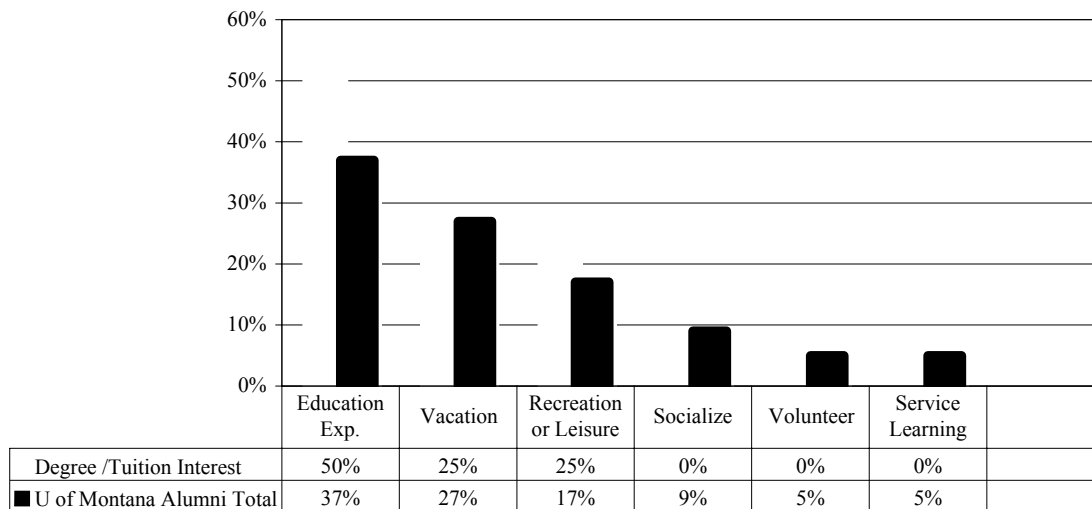


Figure 17. A total of fifty one respondents (n=51) from The University of Montana Alumni sample responded to the question of “When you think of being in an educational program, do you think of it primarily as an educational experience, a vacation, a recreation or leisure activity, an opportunity to socialize, an opportunity for volunteering, or an opportunity for service learning?” Eight (8) respondents (n=8) answered “yes” to the question “Would you be willing to pay university tuition to change to a career in human services, education and community leadership. This cross tabulation illustrates interest and the potential for course development in the areas of experiential education, learning vacations, and recreation and leisure for future planning in higher education.

Figure 18. Typologies of Elderhostel Participants Willing to Pay University Tuition and Interested in Career Change to Social Responsibility Areas (n=80)

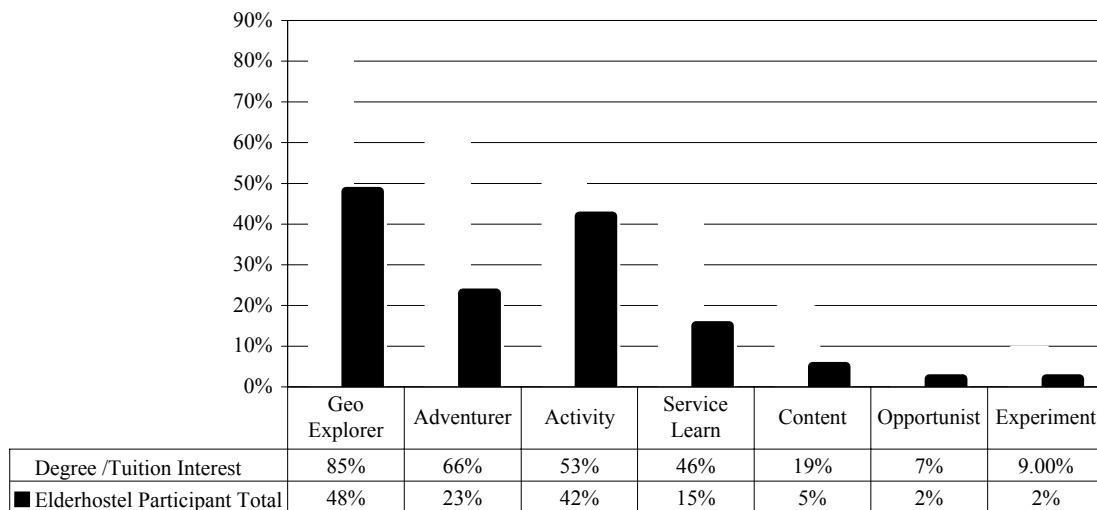


Figure 18. A cross tabulation was made of the Elderhostel respondent typologies and those who indicated a willingness to pay tuition, attend university classes and change their career to social responsibility areas. In each category, the chart illustrates the interests of respondents willing to pursue higher education degrees. Respondents chose more than one typology as their highest interest. The cross tabulation of the willingness to pay tuition with their typology interests (frequently more than one) are listed from the highest interest to the lowest interest typology are the following typologies: (1) Geographic Explorer (n=68) represents eighty five percent (85%) of respondents; (2) Adventurer (n=53) represents sixty six percent (66%); (3) Activity-Oriented (n=42) represents fifty three percent (53%); (4) Service Learning (n=37)

represents forty six percent (46%); (5) Content-Committed (n=15) represents nineteen percent (19%); (6) Experimenter (n=7) represents nine percent (9%); and (7) Opportunistic (n=6) represents seven percent (7%). Compared to the total population of the Elderhostel sample, the interest of respondents for pursuing a degree in social responsibility disciplines at the higher education level is large enough to note.

Figure 19. Typologies of The University of Montana Alumni Willing to Pay University Tuition and Interested in Career Change to Social Responsibility Areas (n=8)

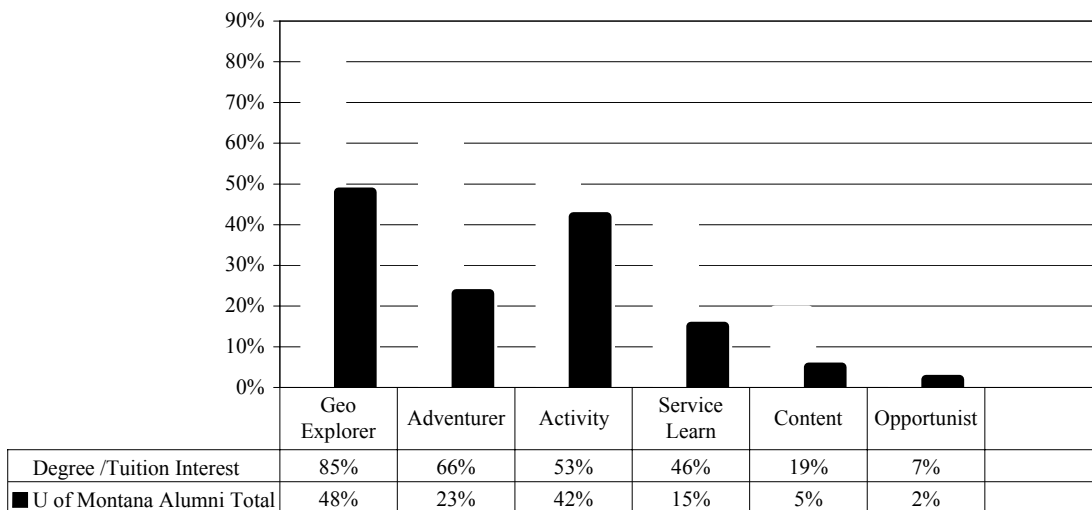


Figure 19. A cross tabulation was made of The University of Montana Alumni typologies and those indicated a willingness to pay tuition, attend university classes and change their career to social responsibility areas. In each category, the chart illustrates the interests of respondents willing to pursue higher education degrees. Some respondents chose more than one typology as their highest interest. The cross tabulation of the willingness to pay tuition with their typology interests (frequently more than one) are listed from the highest interest to the lowest interest typology are the following

typologies: From the highest interest to the lowest interest are the following typologies:

(1) Geographic Explorer (n=7) represents eighty seven percent (87%) of respondents; (2) Adventurer (n=7) represents eighty seven percent (87%); (3) Activity-Oriented (n=2) represents twenty five percent (25%); (4) Service Learning (n=2) represents twenty five percent (25%); (5) Content-Committed (n=3) represents five percent (5%); (6) Experimenter (n=0) represents 0 percent (0%); and (7) Opportunistic (n=1) represents two percent (2%). Compared to the total population of The University of Montana Alumni sample, the interest of respondents for pursuing a degree in social responsibility services at the higher education level is notable.

Category H Tax Credit and Financial Incentives

Figure 20. Elderhostel Participants (n=505) and The University of Montana Alumni (n=42): Favor of Grant or Tax Credit to Older Americans to Train or Work in Job in Public or Community Service

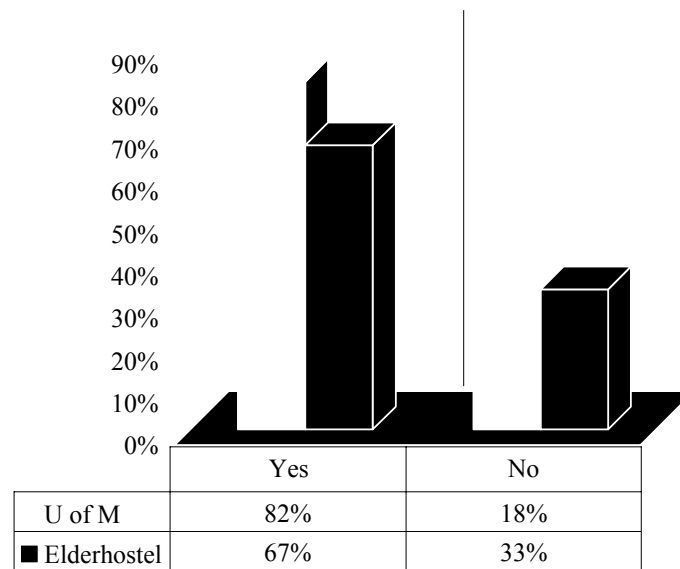


Figure 20. The respondents of both sample populations favor tax credits to train and work for the public good.

CHAPTER SUMMARY

Key points in the results of this research are in the areas of: a). Linking typologies of leading edge Baby Boomers and older adults in educational travel programs to make career transitions in social responsibility disciplines and university degree bearing studies; b). Taking a job to improve quality in the community; and c). The analysis of research results in public policy and financial incentives, such as tax breaks and grants to change careers to service the public good.

The top choices of typologies of leading edge Baby Boomers and older adults in educational travel were geographical explorer, adventurer and activity-oriented. The majority of Boomers who would pay tuition for a re-education degree in social responsibility disciplines also chose the same top three typologies.

The results of linking typologies of leading edge Baby Boomers and older adults in educational travel programs to make career transitions to social responsibility disciplines through training and/or degree bearing university degree programs are included. Experiential learning, social responsibility disciplines, and transitioning to new careers that focus on the public good are displayed in the tables, figures and descriptions of the research of this study. The respondents showed interest in their willingness to change to a career in social responsibility disciplines. The cross association of typologies with interest in a higher degree in a social responsibility discipline in higher education with experiential learning provides interesting findings in this research.

The research results also showed that the majority of respondents of both sample

populations would be interested in a grant or a tax credit to train and work for the public good.

CHAPTER 5

CONCLUSIONS AND RECOMMENDATIONS

*The purpose of life is to live it, to taste experience to the utmost,
to reach out eagerly and without fear for newer and richer experiences.*

- Eleanor Roosevelt

Conclusions

Higher education has been branded for younger students (ranging in ages 18-25). The 21st Century is a prime time for higher education institutions to make a major commitment to attract adult students over 50 years old who are interested and motivated to make a mid-course career change. There is a unique opportunity to tap the great wealth and depth of experienced individuals for education and training leading to sequential careers in social responsibility areas, including human services, education, health care, arts and culture management, and nonprofit community leadership roles. The integration of lifelong learning, experiential learning, quality of life work in communities and higher education will benefit all the stakeholders of society.

Higher education institutions can reinvent their strategies to target Boomers and older adults for enrollment to capitalize on the *experience dividends* of older adults. This depth of experience can transcend to university course work in human services, education, arts and culture management, health care and nonprofit community leadership roles. Now is a good time to empower Boomers and older adults in “second act” careers that provide social capital for work for the public good, as suggested by Newhouse & Goggin (2003).

Conclusions are drawn from the exploratory data analysis of statistics provided through hundreds of survey responses. This study assessed the attitudes, opinions, and demographic information of a segmented population (ages 50-70) to analyze and compare the variables. The questions in this study were: What are the typologies of leading edge Baby Boomers and older adults in educational programs, and why do they choose them? What is the potential for lifelong learning institutes and universities to attract this segment of the population to make career transitions to human services, education, and community leadership through certification, training and/or tuition bearing university degree programs? Would you be interested in taking a job to help improve the quality of life in the community? Would you be in favor of a grant or a tax credit to older Americans who spend a year in training for community service or actually work in a job in public or community service?

The answers to these questions can help create the foundations for creative, societal solutions to problems facing people now and in the future. Higher education programs that integrate the findings of this research will offer new avenues of learning for Boomers and lifelong community building.

*Research Question 1: What are the typologies of leading edge
Baby Boomers and older adults in educational programs?*

The majority of respondents from Elderhostel programs and from The University of Montana Alumni described themselves as the top 3 typologies:

1. *Geographical Explorers*. These respondents love exploring and look for a program that takes them to a part of the world to learn about the local area, history, people, and customs. This category is the most mentioned and represents the majority of respondents. As cited in Romaniuk & Romaniuk (1982), characteristics of the adult

learner are inherent in this typology representing the desire to learn, explore, curiosity and socialization. The adult learner's desire for socialization is also confirmed through the participation in educational travel programs. An experiential approach allows numerous opportunities for the learner to connect the head with the body, mind, heart, spirit, and soul.

2. *Activity Oriented*. These respondents prefer a program where the learning is combined with some form of physical activity, preferably outdoors. They avoid programs where they think most of the learning will take place sitting in a classroom. As cited in Knowles (1970), learning becomes more socially oriented as the learner matures. Experiential learning is a high desire of adult learners and is demonstrated effectively through outdoor activities that include teambuilding, decision-making and problem solving. Through their participation in lifelong learning institutes and academically linked retirement communities, collaboration and teamwork, adults learn more productively when they share responsibility for the learning process by actively participating in the planning and operation of the experience.

3. *Adventurer*. The adventurer is willing to go anywhere and try most anything to enjoy new experiences in learning and socializing. As cited in Knowles (1970), adults learn better and are more willing to participate when the learning is experiential. Adults want to apply what they learn and as a result they view learning as problem solving. Educational programs need to include the ingredients of problem solving, risk, comradeship and personal ownership to meet the needs of the students.

Although not in the top three categories, responses were mentioned enough to note that the category of service learning is the reason the respondents chose a particular

type of educational travel program. As supported by the work of Civic Ventures (2005), through service learning and volunteering, the needs of the adult learner to make a contribution and continue to give to others helps provide the sense of feeling wanted and needed. The need for transcendence and the need for older individuals to feel that they are at a higher level of existence than they were in the past are inherent in these types of educational programs. Adults who can relate their personal experiences to their studies have a stronger personal commitment to learning. Service learning integrated with human services curricula appeals to the intrinsic values of adult learners.

The typologies of these adult learners display characteristics of adult learners and their participation in social, leisure, and physical activities that are related to higher levels of health, self-esteem and life satisfaction. There is a positive correlation between the intrinsic rewards that the adult learner desires and participation in the types of educational programs that include the elements of the geographical explorer, adventurer, activity-oriented, and service learning.

Top Choices for Educational Programs

Education linked with experiential learning through educational travel, vacation and recreation or leisure activity are the major reasons that the respondents from the Elderhostel population and The University of Montana Alumni think of an educational program in this context. These types of experiential education help meet the needs of the adult learner to be expressive and to have continued social interaction, as well as the use of one's senses and muscles.

Lifelong learning program developers and higher education institutions can design more programs to integrate experiential learning with courses in social

responsibility disciplines. They can offer programs that are designed to integrate the educational experience with experiential learning, appeal to the intrinsic motivations of adult learners, and focus on Boomers for new program development.

The findings of this research suggest that some Boomers will want re-education for a degree for a new career in mid-life, and others will want courses for self improvement and personal growth. Interactive learning environments and the opportunity to share strengths and wisdom will appeal to the holistic senses of Boomers and older adults. As supported by Moody (2002), people seeking self-actualization in the developmental stage of mid-life will search for courses for another degree and/or personal growth that will take their lives and their organizations to a higher level.

Research Question #2: What is the potential for lifelong learning institutes and universities to attract this segment of the population to make career transitions to social responsibility areas, including human services, education, and community leadership through certification, training and/or tuition bearing university degree programs?

Learning-oriented individuals tend to be lifelong learners who engage in learning throughout their whole life. Love for learning is a key factor that makes lifelong learning programs like Elderhostel National and university alumni organizations successful, and it is important to include in the appeal to Boomers who are potential students.

There is enough interest from the respondents for institutions of higher education to include the provision of a greater range of certification and training programs in social responsibility disciplines, including human services, education, arts and culture management, health care and nonprofit community leadership. The interests of thirty

percent (30%) of Elderhostel respondents and seventeen percent (17%) of The University of Montana Alumni to attain certification and/or training to prepare for work in schools or social services is important to note. This finding suggests that institutions should create programs designed to encapsulate social responsibility disciplines that can be targeted toward Boomers who want to make career changes.

As evidenced in Walters (1987), it is important to build a relationship with Boomers and older adults to develop their feelings of loyalty. Both Elderhostel and The University of Montana Alumni Association have built positive relationships with the respondents that translate into loyalty to these two educational institutions, and they have both developed repeat customers. They have built trust, feelings of belonging and community that are important to Boomers and older adults. A good example of this relationship building is the synergy developed by universities through university-linked retirement communities and residents which has been proven positive for all the stakeholders, as cited in Palastan (2004).

Based on age, further sub-segmentation of this study revealed that a majority of respondents of this category of questions are in the Boomer age range. They are willing to pay tuition to attend a university to gain the credentials to make the transition from a career in business, professional or vocational type of career to a career in social responsibility areas, including human services, education, health care, arts and culture management, environment, and community leadership. This distinction is of noteworthy interest to higher education institutions for planning and marketing purposes.

As cited in Martin (1997), education is deemed one of the best ways to attain the highest psychological health, personal growth and fulfillment, and become less

externalized with age. Adults returning to school may be motivated not only toward practical concerns such as enhancing career opportunities but also toward fulfilling developmental needs. Through the educational institutional communities and relationships, these intrinsic needs of adult learners can be fulfilled. Higher education can redefine later life as a time for social entrepreneurship and public service.

Higher education institutions can also provide the venue for keeping the brain in shape, too. Duke University professor, Dr. Lawrence Katz (2005) says that those who age successfully seem to have a neurobic lifestyle that potentially will improve brain health. This suggests that institutions should position themselves as one of the pro-active solutions to maintain healthy brain functions through the aging process.

Research Question #3: Would you be interested in taking a job to help improve the quality of life in the community?

The Baby Boomers and older adults (ages 50 to 70) in this study all indicated an interest in taking jobs to help improve the quality of life in the community. As cited in Novelli (2006), people age 50 and over want to leave a lasting legacy by leaving the world a better place than they found it and giving back more than they take, especially helping those less fortunate than themselves. They are willing to give back to their communities through work now and for the rest of their lives.

The keys for revised programs in higher education institutions are offered through review of the research findings. The following synopsis summarizes the top categories of work (all within .01 of each other) and includes the following:

- (1). The respondents from both The University of Montana Alumni (choice #1) and the Elderhostel population (choice #2) indicated that they would be interested in a

program that **helps the elderly, the poor, or other people in need.**

(2). The Elderhostel respondents (choice #1) indicated that they would be interested in **working in an arts or cultural group, such as a museum, theater or music group.**

(3). The University of Montana respondents (choice #2) would be interested in a job **working for a neighborhood or civic group such as a neighborhood association or community.**

(4). The Elderhostel respondents (choice #3) and The University of Montana Alumni (choice #3) would be interested in **tutoring or other educational programs such as after-school programs or Sunday school classes.**

These findings suggest that higher education can be an avenue for mobilizing older adults for productive roles in society in their twenty to thirty years of life after retirement. Educational training, certification and/or degree programs can provide the experienced adult learner re-education and re-tooling skills for working in social responsibility areas, including human services, education, health care, and nonprofit community leadership positions.

Reintegration in mid-life is important to the healthy maturation process of adults and is characteristic of feeling more certain of one's true identity and adopting the appropriate persona. Creating programs of interest for older adults that appeal to the intrinsic values of personal growth, development and self-actualization of the older adult are key factors to include in higher education plans.

Full time or part-time paying positions to improve the quality of life in the community are jobs that some Baby Boomers want to pursue in mid-life. The intrinsic value of revitalizing a community, to live and work with passion and purpose is

especially fulfilled through work for the common good of one's community. Inspiration, revitalization and sense of purpose are values important to the lifelong learner. This would suggest that higher education institutions should design certificate programs and higher education degrees to fulfill this sense of purpose.

Research Question #4: Would you be in favor of a tax credit to older Americans who spend a year in training for community service or actually work in a job in public or community service?

A larger number of respondents - eighty-seven percent (87%) of The University of Montana Alumni and sixty-seven percent (67%) of the Elderhostel population - answered yes to this question. Tax paying Boomers and older adults could benefit from a tax credit or a grant that would provide a good incentive for a Boomer to go to training and/or a university to earn career credentials in social responsibility work.

Volunteer tourism and service learning programs are very popular with Baby Boomers and older adults. As they spend vacation time to travel for short periods of time to international destinations (especially Third World countries), many are performing service work. A share of the program charge is allocated as a donation to the service organization to help with operational expenses. Because Elderhostel and partnering service organizations are public charities exempt under Section 501(c)(3) of the Internal Revenue code, expenses are generally tax-deductible.

According to the IRS Publication 526 (2006), certain rules are applicable for volunteer work travel expenses if listed as a tax deduction. Tax deductions depend on the volunteer organization running the program. Part or all of program fees and travel expenses can be tax deductible. Out-of-pocket expenses are tax deductible when a person

serves a qualified organization as a volunteer. Travel expenses are deductible only if there is no significant element of personal pleasure, recreation or vacation associated with the travel. The volunteer's professional services are not tax deductible as in-kind services.

Summary

There is nothing magical about reaching 50 or making it to 60 or hitting 70. It's not like hitting a particular age and losing the capacity to learn and to be creative. The findings of this study reveal the strands of interest in social responsibility work by Baby Boomers and older adults. Higher education and lifelong learning institutes are in the prime position to provide leadership and programs that will empower these curious Boomers and hardy elders to give back to society by working in fulfilling jobs for the rest of their lives.

Five Themes Emerging from Data of Study

1. Experiential learners (ages 50-70) are enthusiastic and eager to participate in **educational experiences** and highly motivated to participate in active programs that include **geographical exploration, adventure and service learning** in the U.S. and international countries.
2. Experiential learners (ages 50-70) are interested in **switching to work in careers** to improve the quality of life in the community, primarily to **help the elderly, the poor, and people in need; arts and culture; civic and neighborhood groups**; and **tutoring** in education programs.
3. Experiential learners (ages 50-70) overwhelmingly **favor a grant or tax credit** to older Americans for spending a year in **training for community service or working**

in a job in human services.

4. Experiential learners (ages 50-70) are interested in getting **training** at a university or a lifelong learning institute to prepare **for work in social services or schools.**

5. Experiential learners (ages 50-70) who participate in **active, educational experiences** that include **geographical exploration, adventure and service learning** in the U.S. and international countries are also **willing to pay tuition** for a college degree in human services.

Social Responsibility

Experiential educational learning and travel offer a recipe for broad cultural transformation. *The Age of the Curious Learner* is supported by a person's ability to tap into multiple cultures and people's needs throughout the planet via the Web, air and ground transportation, and organizations that offer serving and learning opportunities. As evidenced in the work of Erikson (1986), research has found that the hallmark of the midlife generational stage is giving back to the next generation.

A person who wants to commit a reasonable amount of time and money can offer solutions for improving the quality of life for people throughout the United States and other countries. For instance, volunteer groups of educated people, including alumni associations of major universities, are donating money for building water wells for Third World communities to provide clean water in many countries. This major service work provides a clean, safe solution to dirty, unsafe supplies of drinking water, which is the number one cause of death in the world.

ReWirement not Retirement

As cited by Wilson (2006), thirty-seven percent (37%) of Baby Boomers report that continuing education is part of their retirement plan. Most respondents of this study have a college degree, and many also have a post graduate degree. They already display a connection and affinity to educational programs and represent the potential for providing social capital, practical life experiences, and intelligence for today's social responsibility in professional positions. The majority of respondents in this study have retired from a previous career, yet display interest in working again and in the social responsibility sector in the future. They have extensive work experience in teaching children and social services, and they have made a major career change in their work lifetime. They have shown the courage to change careers, and some would be willing to do it again.

Nationwide, thirty percent (30%) of Boomers, over 24 million people, have completed college degrees, as cited in Edmondson (2005). Seventy percent (70%) of Boomers have not completed a college degree, so the potential market for Boomers to return to school to earn a degree is nearly 54 million people. Based on the results of this study, it is suggested that over 3.5 million people would be interested in re-education at a university to earn another degree or graduate degree. Nearly 10 million people would be interested in entering the university to earn a college degree.

Mutually Beneficial Financial Benefits

A mutually beneficial partnership of university commitment and enrollment of older adults will help both parties attain greater financial stability in the future. As cited in Dennison (2002), devising strategies to assure viability in a situation severely constrained by resource scarcity will become the key to success.

The higher education institutions will benefit from more students who pay tuition, accomplish another degree, establish loyalty to the institution, and eventually make donations to the university as alumni. The older students will benefit from attaining a new degree or certification that will earn a tax credit for them as a student. It will also enable them to attain purposeful jobs for the social good as well as the opportunity to work for pay in the social responsibility sectors.

As the leading edge Baby Boomers have been turning 60 years old, now is a good window of opportunity to tap this experienced, educated pool of people to help solve some of society's problems to improve the human condition in communities. Many respondents in this study displayed the interest and the motivation to pursue a mid-course career change to positions that serve the public good. It is now time for institutions of higher education to tap into the growing social phenomenon of meaningful work for Boomers in their "second act" of life.

Recommendations

Lifelong Learning Educational Programs and Institutions of Higher Education

Continued Learning

Boomers can expect to live long lives thanks to medical advances and information about physical and brain health. As evidenced in Goleman (2007), stem cells of the brain manufacture 10,000 brain cells every day, and social interaction helps neurogenesis. Boomers are seeking a sense of purpose and personally meaningful experiences in their lives during the "second act" of their lives. Beyond the midlife drive to succeed at any cost, many Boomers are looking for new directions to make their extra years of life more personally meaningful. They see work as a way to stay challenged and mentally active and sustain a link to the community they have been a part of for most of their lives.

Higher education changes a person's attitudes and interests in all kinds of ways – higher income, better health practices, strong attachment to the alma mater, and more interest in lifelong learning. Institutions of higher education can provide leadership, and target market Boomers and older adults to enroll them in certification programs and/or tuition bearing college degrees in social responsibility disciplines that will tap their intrinsic motivations. Alumni associations of universities and nonprofit educational organizations, like Elderhostel Lifelong Learning Institutes affiliated with universities, can target alumni ages 50-70 to tap into these attitudes and interests, and offer degree-earning classes in social responsibility areas.

Teaching “Rewire not Retire” courses to Boomers is already having an effect in different parts of the U.S. By expanding these types of courses and reaching out to Boomers in all states, higher education can be the potent force to raise the level of ethics, higher living standards in communities, and enhance cultural creativity. Higher education can lead an interdisciplinary approach in the analysis of issues and problems facing communities today. For example, the success of academic villages of retired professors, alumni, administrators and other retirees linked to universities throughout the country can be replicated in many university communities. This will also provide new job opportunities such as the Dean of Residents in an Academic Village, one of this researcher's career goals.

Another link to older adults' interest in higher education is supported in the physical layout of the university campus that provides accessibility. Many higher education campuses have already spent a lot of money to implement the facilities changes mandated by the Americans with Disabilities Act. This is one point of convergence that

will serve people with disabilities and older adults who may need assistance for physical accessibility.

Tuition Incentives

Higher education institutions can consider reduced tuition incentives for alumni of a university re-entering their university to earn another degree in social responsibility disciplines including human services, education, health care and/or nonprofit community leadership. The federal government and higher education can form a new partnership to offer tuition grants and tax breaks for attending universities after age 50 to support new forms of philanthropy and public service that truly solve problems. Higher education and corporations can partner to include tuition in retirement packages and support scholarships for their employees and retirees through their foundations.

Future Strategies for Higher Education

1. Higher education can appeal to the intrinsic learning motivations of Boomer and experiential learners by developing more college credit courses that integrate active geographical explorations, adventure and service learning.
2. Higher education curricula specifically developed for Boomers can integrate more college credit courses in social responsibility disciplines that include experiential service learning components.
3. Higher education can develop graduate schools designed specifically for experienced professionals ready to make the transition from their primary earning careers to years of flexible social responsibility work in their “second act.”
4. In alignment with progressive changes in higher education, it is important to assess the impediments that face adult learners who want to enter graduate school to pursue re-

education in social responsibility disciplines. Graduate schools can consider the person's life and career experiences with other requirements, like prior degrees and the graduate record exam for entry into social responsibility graduate programs.

Recommendations for Further Research

Boomers, Older Adults and Brain Health

Continued learning is stimulating and good for brain health as reported by Duke University professor Dr. L. Katz (2005). Boomers and older adults want programs to fulfill life goals, including service, work, and staying current on issues. There is a mass of anecdotal evidence about the effect of education on physical and psychological wellbeing. Future researchers in academia can carefully design case studies to substantiate such evidence which includes improvement in memory and learning in people ages 50-70. Studies of brain research, how older adults learn, and the research of the plasticity of the brain offer many opportunities for educational research experts to partner with the scientific, medical, and psychological research arms of higher education and private corporations. "Brain Gyms" connected to universities, schools of education, and continuing education can be implemented on the campus of the university for research studies with Boomers and older adults.

Boomers, Older Adults and Education as a Personal Growth Motivator

Boomers and older adults' motives toward educational participation are more intrinsic and personal growth oriented. According to adult developmental theories, it is natural that adult needs would turn more toward personal growth and fulfillment and become less externalized with age. Research that directly addresses personal growth as a motivator for adult achievement offers new opportunities for further studies.

Education is the process of discovery. Education is a process of living, not a preparation for life. Why do we continue to be curious and want to learn? In our process of discovery to find the answers, we reach our personal and spiritual human core.

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APPENDICES

APPENDIX A

Cover Letters

Participant Questionnaire Survey

Elderhostel Educational Program Letterhead:

February 8, 2006

Dear Elderhostel Participant,

As an educational not-for-profit organization, we at Elderhostel are always interested in learning. In this case, we are hoping to learn more about our participants' interests and would like to ask you to help by completing the enclosed questionnaire. This questionnaire is part of a broad research study focusing on the academic and professional interests of adults who participate in lifelong learning activities.

We are working on this particular study with a graduate student – who is herself an older adult – seeking to finish her doctoral degree in higher education and leadership by the summer of 2006. Together, we are looking to this research as an aid in pursuing our ongoing mission to create innovative and meaningful learning experiences for older adults.

We know that you are very busy, and we would very much appreciate your taking the time (about 15 minutes) to fill out this questionnaire. Your feedback will be a valuable contribution to this study and will influence our future program offerings.

Please return the enclosed questionnaire to Ann Harwood in the enclosed envelope as quickly as possible and not later than March 8, 2006!

Thank you for your cooperation and continuing support!

Sincerely,

Bob Authur
Elderhostel, Inc.

P.S. Please return your survey in the enclosed prepaid reply envelope by March 8, 2006.

The University of Montana Researcher's Cover Letter

February 1, 2006

Dear Educational Traveler,

I am writing you to ask you to participate in an important study on higher education and older adults. Your answers to the attached survey will provide useful information for the future planning of programs which will meet your needs, as well as the educational institutions that offer innovative lifelong learning programs. You are the most important partner in the equation of higher education and the transitions evident in our society today as the lifespan of people increases.

Since you have demonstrated your interest in your learning through educational travel programs, you are part of the growing community of people who in the third stage of life are learning, applying new things in your life and having fun doing it. If you are retired from one career and interested in pursuing another, the opportunities are great for you to enter courses that are for your own personal interest, to pursue a degree in a new field, or merely for the joy of learning.

I am an older adult myself and entered The University of Montana in mid-life to pursue a doctorate in educational leadership and higher education. It is important to have a voice in the future of education and to help create mutually beneficial roles for both the providers of education and older adults. I am asking you to fill out the survey and return it to me as soon as you can. I am working on a fast track to complete the research and my dissertation by the end of this semester, and receive my doctoral degree right before I turn 60 in September 2006!

I value your participation greatly. Thank you for your kind support, and I look forward to hearing from you soon!

Safe Journeys,

Ann Harwood, MBA
Doctorate of Educational Leadership Candidate
The University of Montana

P.S. Please return the survey in the enclosed prepaid envelope by March 8, 2006. Thank you!

Lifelong Learning Questionnaire

Thank you for taking some time to complete this questionnaire about lifelong learning. Your answers are greatly appreciated and will only be used in combination with those of other Elderhostelers. Your individual answers will remain confidential at all times.

When you have completed this questionnaire, please return it in the enclosed, prepaid envelope.

Some Information About Your Last Elderhostel Program

1. Please tell us about the Elderhostel program in which you last participated.

_____ (Program Name)

_____ (Location) _____ (Dates)

2. Why did you select this particular program?

3. When you think of being in an educational program, do you think of it primarily as... (PLEASE CHECK ONLY ONE ANSWER BELOW)

An educational experience	<input type="checkbox"/>
A vacation	<input type="checkbox"/>
A recreation or leisure activity	<input type="checkbox"/>
An opportunity to socialize	<input type="checkbox"/>
An opportunity for volunteering	<input type="checkbox"/>
An opportunity for service learning	<input type="checkbox"/>

Other (PLEASE SPECIFY): _____

2. What type of person are you?

On a scale of 1 to 5, circle the number that indicates how similar you are to the description.

- 2.1 You love exploring and look for a program that takes you to a part of the world you have never seen to learn about the local area, history, people, or customs.

1 2 3 4 5
That's not me at all. That sounds like me.

- 2.2 You like adventure and are willing to go anywhere and try most anything to enjoy new experiences in learning and socializing. Amenities and accommodations are not as important to you as participating in an interesting program.

1 2 3 4 5
That's not me at all. That sounds like me.

- 2.3 You still feel like a newcomer to educational programs and are some what nervous about "going back to school". To feel more comfortable you look for a familiar subject area in a program close to home.

1 2 3 4 5
That's not me at all. That sounds like me.

- 2.4 You are not particularly interested in attending classes; rather you are attracted to Elderhostel programs because of the affordable accommodations and convenient meal times.

1 2 3 4 5
That's not me at all. That sounds like me.

- 2.5 You are passionate about studying a favorite subject and only consider registering for a program that can advance your knowledge in this area.

1 2 3 4 5
That's not me at all. That sounds like me.

- 2.6 You prefer a program where the learning is combined with some form of physical activity, preferably outdoors. You avoid programs where you think most of the learning will take place sitting in a classroom.

1 2 3 4 5
That's not me at all. That sounds like me.

- 2.7 You are committed to studying a topic and combining the learning with service and volunteering.

1 2 3 4 5
That's not me at all. That sounds like me.

3. Questions About Service Learning

“Service Learning is the linking of community service and academic study so that each strengthens the other.”

3.1 Have you ever:

- Made a major career change
- Worked in social services such as jobs that help the poor, the elderly or other people in need
- Taught children either as a job or on a volunteer basis
- Started your own business
- Taught young adults at the college level, including community colleges

3.2 Would you be interested in taking a job to help improve the quality of life in your community?

- Tutoring or other educational program such as after-school programs or Sunday school class
- An arts or cultural group, such as museum, theater or music group
- A youth program, such as a day care center, scouts or little league
- A neighborhood or civic group such as a neighborhood association or community board
- A program that helps the elderly, the poor, or other people in need
- A hospital or health organization including those that fight particular diseases
- An environmental organization
- Teaching full time in grades K-12
- Teaching part-time or full time at a community college or university

3.3 Would you be interested in getting training at a university or Elderhostel Lifelong Learning Institute to prepare for work in schools or social services?

- Yes
- No

3.4 Would you be in favor of a grant or tax credit to older Americans who spend a year in training for community service or actually work in a job in public or community service?

- Yes
- No

3.5 Would you be willing to make a change to a career in human service?

- Yes
- No

3.6 Would you be willing to pay university tuition and attend classes to gain the credentials to make the transition from a career in business, professional or vocational type of career to a career in human service, education and community leadership?

- Yes
- No

Some Final Questions:

3.7 What is your age?

- 50-54
 55-59
 60-64
 65-70
 71+

3.8 Which of the following best describes your current employment status:

- Employed
 Self-employed
 Retired and not working
 Unemployed and looking for work

3.9 Have you ever retired from a previous career?

- Yes
 No

3.10 What is the last class you completed in school?

- High school graduate
 Some college or university work, but no four-year degree
 College or university graduate
 Post graduate or professional schooling after college (including work towards an MS, MA, PhD., JD, DDS, EdD, or MD degree)

3.11 What is your gender?

- Male Female

4. Summary

Is there any additional information you would like to share that would help us better understand who you are and what was important to you when you selected this Elderhostel educational program?

Thank you for completing this questionnaire.

Your cooperation is greatly appreciated. Please put this questionnaire in the prepaid enclosed envelope and return it before March 8, 2006 to:

Ann Harwood, MBA
C/O Jayna Lutz

Department of Educational Leadership, School of Education Room 213B
The University of Montana
32 Campus Drive, Missoula, MT 59812

February 6, 2006

Dear Alumni Association Traveler,

I am writing this letter to you to confirm The University of Montana Alumni Association's support for the enclosed study and to encourage you to fill out the questionnaire provided. This study is an important opportunity for you to provide us with valuable information about someone who is important to our organization, and that is you, a participant of our travel program.

It is also an opportunity to support the work of a doctoral student whose academic and professional interests are focused on the learning opportunities for leading edge baby boomers and older adults. Ann Harwood has been active in educational programs for a number of years and is seeking to finish her doctoral degree in higher education and leadership by the spring of 2006. She is an older adult herself and is dedicated to creating valuable innovative and meaningful learning experiences for older adults.

I know that you are very busy, and I do appreciate your time to fill out this questionnaire (about 15 minutes). I value your feedback greatly and will review all findings as we prepare future program offerings.

Please return the enclosed questionnaire to Ann as quickly as possible!

Thank you for your cooperation and continuing support!

Sincerely,

Bill Johnston
Executive Director
The University of Montana Alumni Association

P.S. Please return your survey in the enclosed prepaid reply envelope by March 1, 2006.

Lifelong Learning Questionnaire

Thank you for taking some time to complete this questionnaire about lifelong learning. Your answers are greatly appreciated and will only be used in combination with those of other University of Montana Alumni Association educational travelers. Your individual answers will remain confidential at all times.

When you have completed this questionnaire, please return it in the enclosed, prepaid envelope.

Some Information About Your Last University of Montana Travel Program

1. Please tell us about the Travel Program in which you last participated.

_____ (Program Name)

_____ (Location) _____ (Dates)

2. Why did you select this particular program?

3. When you think of being in an educational program, do you think of it primarily as...(PLEASE CHECK ONLY ONE ANSWER BELOW)

An educational experience

A vacation

A recreation or leisure activity

An opportunity to socialize

An opportunity for volunteering

An opportunity for service learning

Other (PLEASE SPECIFY): _____

2. What type of person are you?

On a scale of 1 to 5, circle the number that indicates how similar you are to the description.

- 2.1 You love exploring and look for a program that takes you to a part of the world you have never seen to learn about the local area, history, people, or customs.

1 2 3 4 5
 That's not me at all. That sounds like me.

- 2.2 You like adventure and are willing to go anywhere and try most anything to enjoy new experiences in learning and socializing. Amenities and accommodations are not as important to you as participating in an interesting program.

1 2 3 4 5
 That's not me at all. That sounds like me.

- 2.3 You still feel like a newcomer to educational programs and are some what nervous about "going back to school". To feel more comfortable you look for a familiar subject area in a program close to home.

1 2 3 4 5
 That's not me at all. That sounds like me.

- 2.4 You are not particularly interested in attending classes; rather you are attracted to Elderhostel programs because of the affordable accommodations and convenient meal times.

1 2 3 4 5
 That's not me at all. That sounds like me.

- 2.5 You are passionate about studying a favorite subject and only consider registering for a program that can advance your knowledge in this area.

1 2 3 4 5
 That's not me at all. That sounds like me.

- 2.6 You prefer a program where the learning is combined with some form of physical activity, preferably outdoors. You avoid programs where you think most of the learning will take place sitting in a classroom.

1 2 3 4 5
 That's not me at all. That sounds like me.

- 2.7 You are committed to studying a topic and combining the learning with service and volunteering.

1 2 3 4 5
 That's not me at all. That sounds like me.

3. Questions About Service Learning

“Service Learning is the linking of community service and academic study so that each strengthens the other.”

3.1 Have you ever:

- Made a major career change
- Worked in social services such as jobs that help the poor, the elderly or other people in need
- Taught children either as a job or on a volunteer basis
- Started your own business
- Taught young adults at the college level, including community colleges

3.2 Would you be interested in taking a job to help improve the quality of life in your community?

- Tutoring or other educational program such as after-school programs or Sunday school class
- An arts or cultural group, such as museum, theater or music group
- A youth program, such as a day care center, scouts or little league
- A neighborhood or civic group such as a neighborhood association or community board
- A program that helps the elderly, the poor, or other people in need
- A hospital or health organization including those that fight particular diseases
- An environmental organization
- Teaching full time in grades K-12
- Teaching part-time or full time at a community college or university

3.3 Would you be interested in getting training at a University or Elderhostel Lifelong Learning Institute to prepare for work in schools or social services?

- Yes
- No

3.4 Would you be in favor of a grant or tax credit to older Americans who spend a year in training for community service or actually work in a job in public or community service?

- Yes
- No

3.5 Would you be willing to make a change to a career in human service?

- Yes
- No

3.6 Would you be willing to pay university tuition and attend classes to gain the credentials to make the transition from a career in business, professional or vocational type of career to a career in human service, education and community leadership?

- Yes
- No

Some Final Questions:

3.7 What is your age?

- 50-54
 55-59
 60-64
 65-70
 71+

3.8 Which of the following best describes your current employment status:

- Employed
 Self-employed
 Retired and not working
 Unemployed and looking for work

3.9 Have you ever retired from a previous career?

- Yes
 No

3.10 What is the last class you completed in school?

- High school graduate
 Some college or university work, but no four-year degree
 College or university graduate
 Post graduate or professional schooling after college (including work towards an MS, MA, PhD., JD, DDS, EdD, or MD degree)

3.11 What is your gender?

- Male Female

4. Summary

Is there any additional information you would like to share that would help us better understand who you are and what was important to you when you selected this University of Montana Alumni educational travel program?

Thank you for completing this questionnaire.

Your cooperation is greatly appreciated. Please put this questionnaire in the prepaid enclosed envelope and return it before March 8, 2006 to:

Ann Harwood, MBA
C/O Jayna Lutz
Department of Educational Leadership, School of Education Room 213B
The University of Montana
32 Campus Drive, Missoula,

APPENDIX B

Dr. Arsenault Permission Letter

Royal Roads University & Hatley Park National Historic Site
2005 Sooke Road, Castle Bldg
Victoria, BC V9B 5Y2

Greetings Ann,

This communication confirms that I have agreed to provide you with permission to use the questionnaire instrument from my doctoral research as a tool in the development of your future questionnaire. Please feel free to use formats and items as relevant to your inquiry. All I ask in return is proper acknowledgement via standard academic writing protocols, as well as I would dearly love a copy of your dissertation to see where the seeds of knowledge have been planted and grown!

I also extend my invitation for you to contact me during your studies if you wish to banter ideas, discuss results etc.

Best of luck! It is an exciting path you are embarking on, one that will reap immeasurable personal enrichment and add new knowledge to our world.

Nancy Arsenault (PhD), Director of Tourism & Outreach

Royal Roads University & Hatley Park National Historic Site
2005 Sooke Road, Castle Bldg
Victoria, BC V9B 5Y2

Tel: (250) 391-2600 ext. 4424# Cell: (250) 213-8533 Fax: (250) 391-2613

APPENDIX C

Coding of Categories: Educational Programs

APPENDIX C.

Cross Correlation of Categories of Educational Program Participation Compared with Respondents Answers To: “Why did you select this particular program?” The data are grouped as mere descriptors of the reasons the participants listed for choosing a program including educational experience; recreation or leisure activity; vacation; opportunity to socialize; opportunity for volunteering; and opportunity for service learning.

CODING CATEGORY 1: Educational Experience (n=247)

Elderhostel participants who checked Educational Experience as the answer to “When you think of being in an educational program, do you think of it primarily as _____?” wrote these answers to “Why did you select this particular program?”

-
- My spouse and I grew up in New York State. We were eager to go through the locks and learn more about the Erie Canal and St. Lawrence Seaway by experiencing them firsthand.
 - Combined photography, which I am trying to learn more about with travel to NM, which I had never visited.
 - My friend Charlotte Madison, had not been to Italy ever, and we thought it would be best to start in Rome. I had been there before and loved the city. Charlotte unfortunately died of a cerebral hemorrhage late in Dec. before we were scheduled to go together.
 - To hike and see the beauty of Glacier Park.
 - To further my ability to speak French as my daughter is moving to Paris permanently. Had 7 years in school many years ago so a lot is recall.
 - I wanted to visit Rome but had little historical background and felt my husband and I needed some help in seeing a marvelous city.
 - Great outdoor opportunities; learn about the East Coast.

- I have never been to Philadelphia and wanted to explore the city with guides. Also, the hotel was centrally located for exploration on my own.
- Interest in the country specifically Panama Canal.
- Because it covered all aspects of Victoria area: History, city tour, arts & Music, food, etc.; and because my sister lives in Washington State. We met in Victoria for the Elderhostel, and then I went on to spend several days at her home.
- I can't remember the exact name of the program but it was about crabbing and the life of the crabbers (watermen). I chose it because it was on and near the water, plus we went to two islands, which I love, and I was curious to learn about the subject matter. Plus it was close enough to home that I could drive to get there. I attended 3 programs in one year, all of them very good. Then I had much to deal with and didn't have time to go another. But I will be back!
- I was interested in visiting Key West and also learning about the plants, flowers, and history of the area.
- I had for years wanted to visit the Havasupai pools and this was an opportunity. I have hiked across the Grand Canyon in 1960 and rafted in 1989.
- I wanted to visit Rome but had little historical background and felt my husband and I needed some help in seeing a marvelous city.
- I have never been to Philadelphia and wanted to explore the city with guides. Also, the hotel was centrally located for exploration on my own.
- Like to work outdoors, interested in nature, did the same program in '05 and liked it very much.
- To further my ability to speak French as my daughter is moving to Paris permanently. Had 7 years in school many years ago so a lot is recall.
- Interest in the country specifically Panama Canal.
- Husband's interest in the Civil War. Our fondness of locale; about to retire, so we are looking at the area with that in mind.
- To visit the Biltmore Estate but know some history on it prior plus the fact that it was combined with the music and stories from the Appalachians.
- I wanted to share the Christmas holiday with others, and in a location that was beautiful, historical and enriching to me personally. My family is in transition and it was important to me to share a setting as provided by this Elderhostel program to do something meaningful.

- I'd never been to NYHS.
- Lewis and Clark connection.
- A friend who knows that I travel a lot wanted to go to Italy. I suggested Tuscany. I also like Elderhostel because they go beyond the "beaten path." I have also done Cuba (2 times) New Zealand train rides, queen Elizabeth 2 ocean voyages, Monticello, etc. All with Elderhostel and bike tours in France!
- We picked this program because of our interest in art history, particularly the Impressionists and the fact that, although we had been to the south of France, we had never been to Paris or Normandy.
- To enhance my knowledge and pleasure of Native American Art; to have the experience of learning from native Americans; to enjoy Santa Fe with others of similar interest; 2. To relax and enjoy Santa Fe after the intensity of the Indian market and to learn more about, appreciate; enjoy the opera, Georgia O'Keefe, and Flamenco.
- Learn about Pittsburg.
- Interest in Italy - history, archaeology, social customs, language we have served in Italy 3 times in the diplomatic service and enjoy coming back and learning even more about Naples and Sicily, too. Will do Umbria in May 2006.
- Love archaeology digs and study pre-Columbian America.
- I chose the trip because it was an area of Italy that I hadn't seen before. Also I heard that the Trinity College was excellent.
- Interest in the Amish; right time of year; cost.
- The combination of music, a cruise and sightseeing at particular places made this program interesting to me. The history of the music, plantation life and the Civil War was enticing!
- My husband and I had visited the Cape as a young married couple and thought it would be interesting to return and to visit islands we had not visited before.
- Our friend invited us, and the brochure described details which we can enjoy. I liked the chance to learn more about music performances. We saw opera, ballet, symphonies, and also museums, historic places, Potsdam and San Soukis.
- Wanted to learn about Charleston and its history.

- I fell in love with Canyon Country in Arizona a couple of years ago...and am a life long "tree hugger". This program "called to me."
- Get out of PA winter; enjoy Everglades from previous trip.
- I was going to Florida to visit friends and family and wanted an EH to continue my visit. Those in Florida were too expensive, so I chose SA, a city I had always wanted to visit. Good choice.
- Combination of hiking, rafting, Rocky Mtns., National Parks and cost.
- Wish to travel internationally with a grandchild and have other children involved in the experience to make it a good experience for my granddaughter. I wanted to get to know her better and to open her mind to the greater world.
- Location, good time, good rates, med. hiking level, moderate, and guided tour.
- The sport of cross country and uniqueness of the dog sledding event.
- To learn to use our digital cameras and to see Zion and Bryce Canyons.
- Very interested in History, also originally it was a cruise, which would have cut down on the bus time. But the cruise line pulled out and EH did their best. Oops! Forgot EH hiking in Quebec 2004.
- I have had a long time interest in Shakers. It seemed like the perfect experience to be working and staying in an actual Shaker building.
- I wanted a chance to attend a performance at the new Disney Hall and to learn more about the LA Philharmonic.
- Interest in Civil War.
- The program was located in a scenic area where I had a good chance of getting memorable photographic images of ice and snow. As a landscape photographer, I will use these images in local and international competitions, and for slide shows.
- To learn about shakers and learn museum procedures and visit NH and VT!
- It was one of the few hiking programs available in February From a brief previous visit I always wanted to return to see it more in depth.
- I try to pick one EH down south on or near the sea each winter. Plus, Friends had recommended it.

- History content.
- Musical tribute to France; enjoy performances at Lincoln Center; close proximity to my home.
- Always wanted to go.
- To improve our bridge skills and to visit Canterbury Retreat and Conference Center.
- I hoped to learn more about the museums and zoo.
- Always wanted to see the keys and learn history.
- We wanted to see Central America and go through the Panama Canal but do not like the big ships.
- Location and programs both had great appeal to my husband and me.
- Biking, good # of days, interesting learning. Area we had never explored. Chose Elderhostel (as opposed to back roads) good price, right level.
- Visited U of A observatory, Lowell and Naval observatories in addition to classroom experiences.
- We are interested in the New England history and commerce.
- We have been country music fans for over 30 years and Rock & Roll fans for about 50 years. We also appreciate jazz. This program is a learning experience in all three areas. Plus we have never traveled to these areas and wanted to see so many places of interest and we wanted to get a feel for the cultural differences, culinary experiences, and enjoy the beauty of the landscapes.
- Wanted to see Peter the Great interpretation of Venice.
- Civil War buffs.
- I wanted to see coral reefs before they are gone.
- My undergraduate major was French and I hoped to improve my facility and confidence in using the language - I did!
- Interest in East Coast spring migration; affordable price; enjoyment of New England area.

- A friend and I wanted to visit Greece for vacation. My friend had traveled with Elderhostel on several trips and was happy with the experience. She suggested the program.
- See new sights, birding and whales, learn about the area; meet people.
- We have tried and planned to visit Yosemite for several years. This way we "bought tickets" and so no excuse to not go.
- I love camping and I love being on the water. I've always wanted to go on an extended rafting trip; I was also attracted by the educational component.
- Interest in French wines/friends were going with me. Interest in French culture.
- In this case it was location always wanted to explore that area and some friends were going.
- Interested in the geographical and history of the area.
- I love snorkeling and want the coral reefs to be preserved.
- I am fascinated by medicine and graduated with a BS in biology. Thus biology, genetics, chemistry and their modern uses in law enforcement and archeology interest me. I also wanted to see how authentic the "CSI" program really was.
- Well to be honest, my girlfriend and I were at our yoga class last year. She and her husband plan on retiring to Paris; they had purchased an apartment and were renting it for \$750 a week to people they know. We raised our hands!!!! We couldn't believe it; the next day the Elderhostel booklet came in. When we saw Paris and the cost, etc. we knew we had the perfect trip!!! We both are 2 years retired teachers from the CA Dept. of Corrections. I had several relatives who had gone on several Elderhostel's.
- My travel group wanted to go there and I am so grateful we did, as New Orleans will never be the same. The program was wonderful and we saw it all!
- Like to do outdoorsy, active things and my son is in Washington State.
- My husband is a Civil War nut and it was the first program I could get him to go on. Also, it was close to home in VA.
- Enjoy music and always wanted to see Venice. Had enjoyed previous trips with Elderhostel and to Italy in other areas.
- I had not been to Bryce, Zion, Canyonlands, Arches, etc. My husband wanted me to see them. Gorgeous Country!

- Physical activity, learning about Canadian history.
- Hawaii was among the last three states for us to visit. This program offered a comprehensive look at the island group, not a "tourist" trip.
- My wife and I "collect states" by traversing them. Hawaii was one of the last three we needed to complete our 50 state collection. Several online searches showed us that his program is one of the more inclusive and best study tours presently available for what we consider a reasonable cost.
- I had always dreamed of seeing the Iguazu falls, and this program combined the best of everything.
- To learn about the Grand Canyon and the Native American cultural history of Arizona and Utah.
- Wanted to experience Costa Rica after hearing so many wonderful things about nature and ecology there.
- Short length visit to SE AZ and Mexico.
- Included areas of Greece we'd not been to before.
- Because it went to north desert along with the usual Lima-Cusco route and I love archaeological sites.
- Interest in the island and the culture.
- Wanted to see the Maya sites and the educational component was a plus. Curiosity, liked location.
- For: Language immersion; exposure to Zapotec culture; mingling with Mexicans.
- My great grandfather fought for the North at Vicksburg and his brother was killed there.
- International program with interesting sights included. Barge adventure with total of 20 participants and excellent guided tours.
- We wanted to see the terra cotta warriors, Guilin, Yangtze River before many villages flooded due to dam project. We'd been to Beijing and Shanghai a few times previously but wanted to see the above mentioned.

- It fit in well with two other programs (Canyon de Shelly and Kirtshner Caverns). I had been near Chaco Canyon before but couldn't go in due to weather conditions. This time we got in.
- Always wanted to visit Yosemite, love of photography, interest in learning more about photography. It was our 1st Elderhostel and wanted to try it out not too far from home.
- We are interested in the history of the US. I have read several books on the Civil War and always interested in information provided on this subject.
- Always wanted to learn about NY.
- My wife and I are interested in the history and culture of those cities.
- Because of the mystique of Death Valley (Death Valley Days, Boraxo, etc.) and because of the hiking opportunities. I love doing day hikes so I'll get some exercise and not gain so much weight from eating all of the good food included in the program.
- I had never been to New England; I am very interested in art and history, as well as architecture.
- I had never been to Disney World. Here was a chance to see it not only as a tourist but also see the interworkings of the operation. Having participated in 17 Elderhostels, I knew they would do a professional job. I was not disappointed!
- Love Yellowstone, nature, history.
- I had always wanted to see China. My daughters in-law went on the same trip, so I had known companions. The trip presented the right mix of stops. Xian, Beijing, Shanghai, three Gorges, a boat trip, museums.
- Have a degree in US history; am just retired and decided to start visiting our historical birthplaces.
- First visit to both countries. Enjoy food and wine. Interest in culture of both countries, especially Chile. Wanted to try a group travel program, our first, after traveling extensively on our own.
- Length/covered both countries w/variety of activities, including museums, hikes, lectures, local cultural programs, nature/ecology.

- My husband and I were blown away when we read "The DaVinci Code", by Dan Brown. The legend really appeals to us. We were thrilled when Elderhostel offered this trip. Can't wait!
- History of WWI and chance to volunteer my time to restore the battleship USS Missouri.
- Interest in traveling to and learning about this part of the world - Maori and Aboriginal culture, natural sites.
- I am trying to attend. Elderhostels in all 50 states and I need OK. Also it was fairly cheap so a friend on limited income could go with me.
- Our Elderhostel trip to Hawaii had been cancelled. We decided to take another trip - shorter, closer by.
- Comprehensive overview of that area of the world.
- I am taking my grandson 11 yrs. old. This will give me an opportunity to be w/ him and expose him to Chicago and many cultural experiences. I like that we are staying at the Athletic Club across from Millennium Park. I am a long time fan and member of the Art Institute.
- Location and the fact that it was an "active" program at my level.
- I do genealogy as a hobby and spend some time using cemetery records or visiting cemeteries to photograph gravesite. This seemed like something I'd enjoy. Also going to St. Kitts in Jan. when we live in northern Illinois is a "no-brainer."
- Combined short courses (2) On American history and one on the basics of birding that included two field trips, plus a warm and sunny locale. We invested two additional days to photograph both birds and sciences; also visited the Egyptian exhibit at a local museum.
- Love Santa Fe and Mexican food.
- Reputation of Elderhostel programs in providing quality programs in terms of experience and education. 2. We wanted to experience fly-fishing in Canada. 3. We wanted to learn more about English art and antiques.
- I had always wanted to visit the NH/Vermont area for most of my life. This was a chance to visit the area and learn also. I love the fitness part of the program. Rented a car and explored for several days after the program.
- The Bush administration was making Cuba off limits to Americans (who supposedly live in the "land of the free").

- Because of the time offered and subject matter this was my 21st Elderhostel.
- Educational program on subject of interest. My husband and I have always wanted to visit the Black Hills area (Mt. Rushmore) and when we select our Elderhostel Program, our goal is to eventually cover each state in the US.
- We wanted an interesting program while visiting family in Anchorage, AZ and we wanted an interesting way to see and experience Denali Nat. Park.
- Location.
- Desire to view and tour park on our own and as part of a structured Elderhostel program.
- The program is located in an area that we had planned to visit this summer.
- Interest in Greek History, Culture and Religion.
- Because I love history, especially as it relates to the Hudson, and I am a musician and loved learning about a very famous conductor. Warwick Valley is beautiful and only 2.5 hours drive.
- My interest in western ghost towns and a desire to be on a "dig." I have explored Goldfield and Virginia City, NV in recent years and went back to complete an MA in 19th western history (1996).
- Wanted to go hiking in this part of country. Previous success w/Elderhostel outdoor programs. Like to stay at Natl. Parks. Cost.
- Comprehensive overview of that area of the world.
- Educational bent, itinerary, opportunity to be with others like me.
- Location and subject matter.
- I am trying to attend. Elderhostels in all 50 states and I need OK. Also it was fairly cheap so a friend on limited income could go with me.
- I had been to Hawaii only briefly in the service 56 years, (only on Oahu) ago. My wife had never been. I looked forward to learning and understanding Hawaii.
- The Bush administration was making Cuba off limits to Americans (who supposedly live in the "land of the free").

- Closest warm weather "working" vacation. Never have been to the East Coast. Liked the idea of being able to help ready the park for visitors.
- The program is located in an area that we had planned to visit this summer.
- Interest in learning about Cherokees; group of 4 travelers could agree on this; affordable spring trip yet gave more than going to a beach somewhere.
- I have enjoyed 2 previous hiking programs in the past and thought this program sounded good. 2. Have not experienced this part of AZ and wanted to hike here. 3. Love meeting new people and seeing those I had hiked with previously.
- I have been interested in the Natchez "Pilgrimage" for years and was delighted to find an Elderhostel program that encompasses the Pilgrimage.
- I wanted to see and learn about Antarctica. I look for "safe" adventures. I have always been interested with that continent at the bottom of the world map. What better way to go than on a ship.
- We have been interested in learning about Russia and experiencing it at the same time. We were not disappointed! Had a great variety of speakers, artistic performances, art galleries, and historic places which made the come alive. The Baltic countries were important in grasping the situation in Soviet Union times as well as programs in their independence.
- I live in the midwest, attended an Elderhostel on the Oregon coast and wanted to spend equal time on the Atlantic coast.
- It dealt with the culture of the Southwestern native American pueblo nations both their arts and culture. Also, part of the learning component focused on Hildegard of Bingham, a woman whose history I admire; she was amazing.
- I was visiting that area during that time and wanted to do something for New Year's Eve.
- Geneva Bay Center runs good programs! My sister and I meet there every year. We knew speakers would be excellent and new areas to think about.
- Interest in birding, location of trip; we know that it was an interesting place to see birds.
- I enjoy PBS Antiques Roadshow so much and thought it would be fun to learn more about how appraisers evaluate and price items. A second reason for selecting it was relative geographic proximity to my home; therefore, ease of getting there.

- Had never been to Texas and wanted to know more about the culture than one would learn through site seeing.
- We took two granddaughters to this intergenerational Elderhostel.. We gave them info on all Texas intergenerational programs. They selected the space center program.
- We were interested in visiting the Biltmore.
- I wanted to learn about the Middle East conflict. I also love learning about art and I enjoy Big Band music. I took my 86-year-old dad with me as he wanted to learn more these topics, too.
- I was interested in Ireland and I wanted to compare hiking with my "usual" hiking Elderhostels.
- I wanted to learn about the various aspects of Savannah's history and culture. It was good but 3 nights of music was too much. One of them could have been another aspect of Savannah life. Also, a whole morning about the Girl Scouts left the men wanting to leave.
- I had never been to Nova Scotia or seen the Atlantic. I love being close to bodies of water as well as spending time with the people of Nova Scotia. Most of all, I appreciate learning about the places I visit.
- We are outdoor people that love animals. My wife and I are volunteer carnivore trackers for the Wis. DNR. Our specialty is wolves. We also give speeches on wolves to schools and service groups.
- Interest in Middle East geopolitics. Interest in global affairs and a desire to travel to Israel sometime in the future. To add more experience and knowledge to my writing as well as meet other writers.
- Opportunity to learn about the state's plants and animals. Work with Florida state park personnel to remove invasive plant species and re-introduce missing species. Access to rivers, canoeing and being outdoors. Had never visited this area before.
- We are fond of Italy and have visited on numerous occasions including several other Elderhostel programs. This was a region we had not experienced.
- Had never been to that part of the country. Everyone should see Mt. Rushmore!
- We wanted a bike tour in Europe on fairly level ground.
- Good combo of education, outdoor exercise, chance to meet vital older people, and for this particular occasion, to see family and friends whom I've invited to

- attend. Also, I've wanted to see Utah area canyons, flora and fauna, and to learn of early peoples who settled the area.
- My mother always wanted to go to Florence and still hasn't at 75. I asked if she would go on this program with me and she said yes! Elderhostel has good reputation and arranges much of what I wasn't able/willing to on her behalf.
 - My mother and I take a holiday trip each year. She was interested in CA especially San Francisco area. We both enjoy wineries and cultural events and this program offered a nice "sampler." I'd been to Napa before and wanted to see another wine area. We both enjoy the coastal scenery.
 - I wanted to see New Zealand. I wanted to take a grandchild on a trip.
 - My husband and I are both interested in religion. This trip could be combined with a trip to see my 90 year old dad who lives in FL.
 - Though I live in NY, I was visiting in Hawaii for holidays, and San Francisco was good stopover where I met up with friends from SD, whom I'd met at a "poetry" Elderhostel the previous April! I love Gershwin, and they teach college social studies so King and Queens of England.
 - Had never been to these Georgia islands, was a good time to get away; was close enough for affordability.
 - Interest in history and the problems of women going West.
 - Learn about the wild horses.
 - See Patagonia; hike.
 - We had planned to visit Russia. Of all the trips we reviewed, we liked the itinerary of this the best: Moscow, St. Petersburg, plus Russia's medieval towns.
 - I selected the program, because of the location and also the education of the Island. It also was easy to get to.
 - I am very interested in pre-Columbian cultures and am fascinated by ancient ruins.
 - Because it was an intergenerational program that we could take our granddaughter to. She was interested in the dulcimer. We made one and learned to play it.
 - We have always wanted to tour the SW and this enabled us to drive from Wis. in a circle route, stopping at national parks, visiting friends and relatives and learning about the culture and canyon.

- Visit and study the Inca civilization.
- New Orleans was a place that always fascinated us. It was great to learn about it and at the same time experience it first hand.
- Location and birding. I am an avid birder, my husband is not. I went to find new birds; he wanted to see the area.
- I liked the idea of seeing an area where I had not been as well as coupling that with service.
- Opportunity to learn about Hopi culture and give service. It seemed that being with Hopis in a school was a more realistic learning experience than listening to someone talk.
- Interest in subject; winter "get away"; easy travel from my home.
- Hadn't been to New Orleans for a long time, and it was Elderhostel's 30th anniversary and knew it would be special. It certainly was!
- All my maternal and paternal relatives are from or come from Sweden. I get multiple emails in Swedish on a weekly basis from my relatives and want to improve my Swedish vocabulary and conversational skills. I love studying foreign languages. My Swedish relatives and I travel back and forth to see each other and I always learn more Swedish and improve my level of Swedish at this Elderhostel. I have attended it 5 times so far.
- To further our experience and knowledge of birding; its location in Carmel CA; the time and location fit a previously planned trip between Oregon and AZ.
- Tour Greece.
- Because I love Yellowstone Park and wanted to learn more about its natural history.
- To learn about the Panama Canal and its construction; to experience the Costa Rica rainforest; to have an opportunity to meet and learn about the Embera Indians.
- Outdoor program; multiple destinations; group size; number of days outside urban area.
- It interested me; sailed lake and ocean for years; love Maine especially Coast.

- The date and subject matter both important. I had taken lab training in 1967-68 in Nantucket, RI at Memorial Hospital. I had not been back since the 70s. While in school lab training, I had not really availed myself of the surroundings or of the rich cultural heritage of RI. Also a day in Newport got me to see the university where I got a BS degree in medical technology. Right after this program I went on to attend a niece's wedding in Va. Very timely, weather was great, too. Elderhostel is the best.
- Close in time and place to Elderhostel service project that I did in Prescott, AZ prior to this program.
- Interest in Native American culture, and desire to work with younger children.
- I enjoyed the previous Eckerd College program and friends I made at that program were going to this one, so we made plans to go together.
- I wanted to build a dulcimer and I like working with wood.
- I wanted to have some special time with my oldest granddaughter.
- Focus on birding, location.
- Wanted to learn history. We were able to attend something close to us with our grandchildren that interested us to a great degree. It was wonderful by the way and we plan on doing it began this year with two other grandchildren.
- First one attended and traveled with friends. It was a subject we were interested in.
- Golf, location.
- Interest in Native American history and art.
- Interest in art history; 2. Workable dates; 3, location.
- Location proximity, subjects-interest in new history.
- It fit my time availability and included the things I wanted to see.
- Educational bent, itinerary, opportunity to be with others like me.
- After having experienced such an active hurricane season last year we thought it would be very informative.

- I have always had an interest in religions and other cultures. This program was a study of both of quite a variety over a short period of time.
- Learn photo shop software program.
- Ventura offered areas of interest - music - literature. Also enjoyed CA.
- The program seemed like it would be a good and worthwhile program.
- To share the birding experience (new for me) with a friend from CA.
- Involved geography and culture that I have an interest in.
- I am a train hobbyist and interested in railroads.
- Interest in classical music.
- In warm climate, could see friends in area, something totally different from what we usually do, may help in volunteer activities.
- I like the subject, thought Elderhostel sounded like a good way to learn/see more and be more of a student than a tourist.
- We select a program taking into consideration things we would like to do, places we would like to go, and places we have not been before.
- Broaden my traveling experience.
- Intense art history interest. I am a docent at the Denver Art Museum.
- Location and subject we were interested in.
- Celebrate retirement with friends.
- Like theater hoped to see the parts of the theater that are not open to the public.
- Location, history.
- I like classical music; I like the music of the composers we studied and were eager to learn more, I enjoy hearing the student recitals each evening. I like getting to see the local museums, the dates fit my schedule and the location is convenient and I know from experience that the teachers at Peabody are excellent.
- Close to home, sounded very interesting.

- A way to see the flower show, escorted.
- Location, activity, educational services.
- I was interested in 2 of the 3 subjects; Lewis and Clark Expedition, comedy in film.
- My parents and sister were going and location.
- Location and climate; topics included; varied agenda for week; good balance.
- Watercolor workshop, location.
- Another program was cancelled and this gave me a chance to see an entirely different country. It also met over time schedules.
- I was interested in learning more about music & composers. There were 3 in the series, but I could only attend one. Otherwise I would have gone to all 3.
- Wanted to tour the opera house.
- Fits in w/my current goal of obtaining a degree in anthropology.
- We wanted an active program that would also interest 3 friends who were trying Elderhostel for the 1st time. We all enjoyed it.
- Likes the education part; the location (never been there, heard how pretty it is and could even drive there); fit in with my summer off from school.
- Active and outdoors in a beautiful location. Affordable!
- Main hobby, stimulating people of same age and similar interests, beautiful "nature" location, educational with mentors, see many of same "fellow students" each year, expands musical horizons, chance for physical exercise, very well run, good food, pleasant accommodations, and more!
- Interest in birding, good guides, new area for me. I would take similar trips and would even consider repeating this one.
- After a pottery class on the wheel at a local college, I wanted to add more "hours or" to my educational experiences.
- Wanted to try Elderhostel Programs, nearby easy to get to, interested in art.

- Interest in early American history and located within driving distance. Always interested in Shakespeare; learning Elderhostel programs generally well organized; attended jointly with friends from other parts of country.
- Educational program on subject of interest.
- Local history content (Will Rogers,, et al; location on route visiting family; dates.
- Retired from 2 careers (health field and history). I am eager to learn more. Airport transportation available. New area for me.
- I want a short program to "test if" I enjoy traveling alone.
- To accompany my friend, her choice.
- It was also very close to us, only 3.5 hours away.
- Like to work outdoors, interested in nature, did the same program in '05 and liked it very much.
- Intergenerational- I took my eight-year-old grandson the age span was right and it was close enough to drive there.
- I have always been interested in watercolor paintings and had done some years ago. This program turned out to be for more advanced students, so I was lost.
- Combination of nature and history; proximity to home (3 hr drive); compatible schedule.
- I like history and archaeology which this program covers.
- I was interested in learning more about the Bible.
- Reference from a friend. I am considering becoming an entertainment reporter when I retire from a local newspaper. I thought the program would be both fun and educational.
- To accompany my friend, her choice.
- Likes the education part; the location (never been there, heard how pretty it is and could even drive there); fit in with my summer off from school.
- Location and subject matter.
- My neighbor asked if I'd be interested. It sounded nice, so I went.

- Interested in photography and hiking.
- A desire to improve meditation study in order to reach a deeper level of concentration; a desire to learn Qi Jong.
- Location, cost, date, subject matter.
- Have a new digital camera and wanted to manage the photos computer using Photoshop Adobe elements software.
- Both my wife and I enjoy choral singing and we had sung G&S before and thought we would enjoy hearing about these two "musicals."
- Reference from a friend. I am considering becoming an entertainment reporter when I retire from a local newspaper. I thought the program would be both fun and educational.
- This is my first Elderhostel.
- It appealed to me since I am a recently retired teacher.
- My brother and his wife were going, so we went along.
- I love the music of Cole Porter. It was close enough to drive to, the price was right. I have a friend in Portland.
- In honesty, this was a compromise, I decided to invite a friend of mine and we settled on this. It was within driving distance.
- Close to home, affordable, of interest.
- My granddaughter and I selected it.
- Intergenerational- I took my eight-year-old grandson the age span was right and it was close enough to drive there.
- I have always been interested in watercolor paintings and had done some years ago. This program turned out to be for more advanced students, so I was lost.
- Combination of nature and history; proximity to home (3 hr drive); compatible schedule.
- I like history and archaeology which this program covers.

- I was interested in learning more about the Bible.
- Reference from a friend. I am considering becoming an entertainment reporter when I retire from a local newspaper. I thought the program would be both fun and educational.
- To accompany my friend, her choice.
- Likes the education part; the location (never been there, heard how pretty it is and could even drive there); fit in with my summer off from school.
- Fun, learning, active and service all together.
- The program covered what we wanted to see and do. Elderhostel has an excellent reputation.
- I was interested in learning more about music/composer. There were 3 in the series, but I could only attend one. Otherwise I would have gone to all 3.

CODING CATEGORY 2: Elderhostel Participants Recreation or Leisure (n=103)

Participants who checked Recreation or Leisure as the answer to “When you think of being in an educational program, do you think of it primarily as...?” also wrote these answers to “Why did you select this particular program?”

- Interest in horses & horse racing.
- Interested in lighthouses; never been to St. Augustine before.
- Been working too hard and needed a getaway.
- Ski with other people my age and topic of Van Gogh was interesting to me.
- I have always wanted to see the lovely Brandywine Valley.
- I love to hike, and I find that the West is where I want to be outdoors. The program was listed on a 3 level. That just fits my exercise.
- The geology talks en route were good. 4 hour drive from my home - central PA; excellent hiking; rural, serene accommodations.
- Have lived 80-100 miles from Philadelphia all my life and do not know much about it.

- To experience a new area of natural history.
- Geographic location.
- For the train ride.
- Interest in the Lewis and Clark expedition.
- Travel to areas I had never visited.
- Hiking, never been in Washington State.
- We were interested in the Frick's; also in automobiles and travel in the 1900s.
- To see Las Vegas again after 25 years and thought the agenda interesting. Had a wonderful time!
- We love the location and the snow. We like to act ski.
- Location.
- Location and session on movie producers.
- Opportunity to rent houseboat at modest cost. Active, outdoor program.
- To learn skiing downhill with people any age. I was newly widowed when I first went in 2004. I enjoyed the social aspects. We skied, ate, and participated in other programs together.
- Wanted to do trip on Mississippi Queen and friends had not been to New Orleans.
- It was inexpensive and nearby at a place we had not been to in a while.
- I am in other community bands and marching bands looking for others to share music experience.
- Enjoy tennis and visiting Indian wells tennis tournament.
- Hiking opportunities; location; time of year; moderate and affordable cost.
- To try the Elderhostel experience; to learn about the area; to experience an outdoor-focused Elderhostel; to meet friends also signed up for the program.
- Interested in subject and area.

- Most interesting looking of trips to China.
- Wife and I have been to the Grand Canyon (south rim), but not to the other two. We have heard and read so many positive things, that we have been wanting to go for several years.
- Active program; friends had signed up; wanted to see Eastern Europe.
- To improve my golf game.
- Active grandsons need active programs. I am a very active grandma - activities "awesome me." I am taking another grandson this year.
- To explore a beautiful place and to learn why it is what it is.
- Husband's Hobby.
- Physical activity that I like. Location scenic, historical, cultural.
- Historic, cultural, religious content combined with hiking.
- I wanted a place to be with other people over the Christmas holiday. I had attended this Elderhostel program twice before and enjoyed it.
- The challenge of hiking the canyon with people my age and people who have the same ideas about nature and the love of hiking.
- Fly fishing experience; visit Alberta, Canada.
- Whales and warmth as well as respect for Latino heritage.
- We had never visited this area and wanted to learn more about it. Also, we love to sail and wanted that experience. We included visits with friends and relatives in this trip.
- To further knowledge about Lewis and Clark's Journey though Montana, also to experience Montana
- Mid week start coincided with a business trip spouse had to attend in same city.
- For outdoor activity.
- To see migrating fall waterbirds.
- I wanted visit the Disney concert hall and Getty Center with my CA friend.

- Location. Interest in bird watching.
- "Warmer" weather in CA than WA state.
- Geography.
- Like to be active, like tennis and hiking and Sedona. Never been to Sedona, like to paint and do something w/friend from CO.
- Nephew's interest in space program.
- I was steered to this one by Elderhostel because the program I originally signed up for was cancelled. Not enough people signed up.
- I love the birds and wanted to visit Panama and see the various species of birds and animals
- Close by. Short duration. I still work. Location (USC's marine research facility) not otherwise available for "regular" tourists. Subject matter of interest.
- I love music; location was near my friend in Boston who accompanied me.
- Never been to Hawaii and always wanted to go.

CODING CATEGORY 3: Elderhostel Participants Vacation (n=88)

Participants who checked Vacation as the answer to “When you think of being in an educational program, do you think of it primarily as...?” also wrote these answers to “Why did you select this particular program?”

- We were interested in visiting and learning about all three cities and the countries they are located in.
- Program and Location.
- Family history in similar music.
- Location near our winter home; fact that there would be 3 days of canoeing on 3 rivers; cost affordable; general reputation of and experience with Elderhostel.

- To see Costa Rica.
- Sounded like fun.
- Interested in dancing to the music of the region.
- Also interested in trying out Elderhostel.
- We like to bike and have been on 3 Elderhostel biking trips - Holland, Danube, Italy- Austria. Going to Kenya Sept. 2006.
- The Panama Canal is a marvel of construction and an experience I wanted to have. The trip also fit in to my schedule at work and home.
- We were interested in seeing the fall foliage and touring the New England states. It was also a birthday (65th) and retirement treat!
- Spent time w/ parents in order to get immersed in something that would challenge my senses and get away from the real world (I still work).
- My parents and their neighbors chose the program; they invited me to join them. I am not quite, but almost old enough to Elderhostel on my own!
- It had the most sites in the 2 weeks we wanted to see.
- Location - close to where daughter lives so I could also incorporate a family visit before/after Elderhostel. 2. Interest in the subject/location (Queen Mary and Santa Catalina Island; never been to either previously).
- Husband had wanted to see it (wife did not know it existed).
- Wife had never been to Grand Canyon, and was developing an interest in geology.
- It was the right dates (birthday week); close to home (or) had not been to the area since I was a child. Was my area of interest and the program hit on most of what I wanted to see and do.
- I know nothing about Texas.
- The program I usually attend at Christmas in Rhode Island was cancelled, so I chose Quebec. Next year some of the people from the Quebec group will go to Mexico for an Elderhostel at Christmas and New Year's.

- To have focus for the first European adventure with my husband. Italy was his choice, and I was happy to stay in one location while being introduced to a few choice surrounding sites rather than trying to see everything a nice balance of education which made the site seeing more meaningful.
- Always wanted to see the Panama Canal.
- Located dates, length of programs were all convenient!
- We have been in most of Western Europe and wanted to see Eastern Europe.
- Knew of the area and thought the accommodations seemed very interesting.
- I'm a bird watcher & photographer. I will use these images in local and international competitions, and for slide shows.

CODING CATEGORY 4: Elderhostel Participants

Opportunity for Service Learning (n=47)

Participants who checked Opportunity for Service Learning as the answer to “When you think of being in an educational program, do you think of it primarily as...?” also wrote these answers to “Why did you select this particular program?”

- Part of the appeal the first time was that I'd read all the Tony Hillerman novels about the Navajo reservation and wanted to see for myself. I loved the school, the children, the whole experience, and talked about it so much that two friends went with me when I went back in 2004. (I'm going again in a couple of weeks).
- Wanted to visit Bolivia and help the people in some meaningful way.
- Wanted a service project; close to very ill (wife' father 250 miles from home but 20 miles from father-in-law; light houses intriguing and write up made it sound very interesting.
- It was my first service-learning program. It was going to give me a variety of outdoor experiences. I felt it was a sort of "payback" to Elderhostel for a previous educational program I had attended.

- Location, location, location! Plus I am involved in restoring aircraft at my local Air Museum (Schenectady, NY) and thought I might pick up something new. Plus, I was able to participate in the observance of the 60th anniversary of the signing of the surrender document by Japanese.
- Interested both in the tutoring program and the programs on Navajo history, culture and current situation.
- Interest in environmental issues and snorkeling.
- I had never been to Hawaii; ship to islands - was great trip. Place and outdoor activities.
- I am a library media specialist (librarian) in an elementary school in Virginia. The 4th grade studies VA history in depth and 6th grade reviews it, so this seemed the perfect way to first experience Elderhostel, business and pleasure.
- It was for not trained people, and I needed to get trained to be allowed to participate in other digs.
- I am interested in the Civil War; it was affordable; I wanted to do service.
- I am a Civil War historical site preservationist. I realize that our National Park System is not adequately funded or maintained, I want to do my part when I have the time, Also to study Civil war history while I am working.
- I had done this program before and recently enjoyed the subject matter as well as the people directing the programs. It is close to home and easy for me to get to.
- Hiking - I choose either active programs or service programs; Death Valley and Zion, never been to either one; based in Las Vegas, easy to fly in and out of and no shuttle required.
- We were interested in a service program and thought Florida would a good choice in Feb.
- Outdoor service, fit our time schedule, something we had not done before.
- This is my "first" experience with Elderhostel program. I chose this program because of location and because I love animals and zoos, I think and hope I will learn a lot plus help out.
- Science, Service, and small group; in area that I wanted to visit.
- Wanted to learn more about the situation on the Reservation; current issues; like to work with children.

- We love to bird! We had never been to Baja before!
- I did the same in 2003 and wanted to return with my husband, because I had so much fun.
- Location and it was combined with other work volunteers: Volunteers/Elderhostel.
- Like hands on paleo digs.
- I am interested in Native American rock art and architectural structures. Also, I am most interested in an activity where I can provide a service while learning. It is rewarding to know that public agencies can complete and further projects otherwise left undone.
- I wanted to provide a needed service while learning about another culture.
- I love to snorkel. Going to a warm climate in Dec.; being able to combine the above with a service component.
- Location - Italy. This program enabled me to combine my love for service programs with my love for one of my favorite countries. Gave me a chance to visit Italy after a very, very long absence.
- Different part of the country; service oriented.
- I really enjoy one-on-one tutoring. I am a retired math teacher. Plus the experience of working with Navajo students sounded very interesting.
- Wanted to be in Montana, service learning component as well as access to Yellowstone. Wanted something less lecture oriented.
- The opportunity to volunteer in a school. To learn about the Navajo cultures. I had done this program once before and wanted to do it again.
- We enjoy the service programs and this was the first one offered in Yellowstone. We have worked in several other national parks. We also enjoy the programs managed by U of MT Western. We also like the tax deductible component.
- Desire to help hands-on in Katrina relief, especially in a somewhat "forgotten" community compared to New Orleans.
- I am a master gardener and I wanted to experience gardening in the high desert.

- I was looking for a service or active program. Sitting in a classroom after lunch can be quite a challenge. I need to be active. I am not athletic.
- I had been to Hawaii only briefly in the service 56 years, (only on Oahu) ago. My wife had never been. I looked forward to learning and understanding Hawaii.
- Closest warm weather "working" vacation. Never have been to the East Coast. Liked the idea of being able to help ready the park for visitors.
- Enjoy service programs, like the MT area; enjoy archaeological digs; combine program with other travel and genealogy research in Salt Lake City.
- Service Project. Worked well with my work schedule. Liked Belize.
- My interest in western ghost towns and a desire to be on a "dig." I have explored Goldfield and Virginia City, NV in recent years and went back to complete an MA in 19th western history (1996).
- Location, I enjoy Elderhostel's Service Learning projects. This was my third one.
- I wanted to see Montana and Wyoming and specially Yellowstone Park and Grand Teton Park; and to learn about the flora and fauna in these states.
- Service project. Always interested in the work of Heifer project.
- To participate in a service program that would help the zoo while being comfortable outdoors.
- I enjoy deserts and also wanted to see the various places we visited.
- Science based program of interest and volunteer opportunity within budget.
- In 1994 I attended the same program; it was not a good experience, assigned to jr. high school classes, as the students moved to each class, the teachers were at a loss about utilizing me; this year I once again experienced lack of utilization in the elementary level, the 2nd grad teacher barely acknowledged my presence while the Anglo librarian was able to have me help with testing or shelve books which I didn't mind doing since I was there to help in whatever way I was needed. But certainly to feel unwelcome in the 2nd grade classroom gave rise to a certain resentment and waste of time.
- I have been doing this program for years, since it began. I love volunteering in classrooms. Went back to work with the same students I worked with last year.
- I always wanted to do volunteer work on an Indian reservation. A life dream. We are interested in fossils and this sounded like a great opportunity. (& It was!)

- Because it was an active program that would involve us in volunteer work, not just listening to lectures.
- To combine travel with service, and to experience a closer connection with the people I meet in Italy. Also I had never been to Puglia when visiting Italy in the past.
- I like the service trips, wanted to see Yellowstone and an interested in native plants.
- We both have an interest in Indian nations education and service.
- Never visited the Virgin Islands, My friend suggested trying a service project as he'd done several and thought I'd like.

CODING CATEGORY 5: Elderhostel Participant Opportunity for Volunteering (n=21)

Participants who checked Opportunity for Volunteering as the answer to “When you think of being in an educational program, do you think of it primarily as...?” also wrote these answers to “Why did you select this particular program?”

- Wanted to learn more about the situation on the Reservation; current issues; like to work with children.
- We wanted housing access to attend the Tucson Gem Show. Part of the program brought us to several venues.
- The program seemed like it would be a good and worthwhile program.
- I was looking for a service or active program. Sitting in a classroom after lunch can be quite a challenge. I need to be active. I am not athletic, so service programs are what I like.
- Interest in Lewis and Clark's expedition, and their travels.
- New service experience, opportunity to see part of country never visited.
- Within my our physical capability. I have an interest in Civil War correspondence between soldiers and family at home. Opportunity to use brain rather than brawn.

This is a "service" program where we can make a contribution, that is give rather than TAKE, we went in 2004, 2005, and going again in 2006.

- To try something new.
- Like Yellowstone, wanted to do service.
- We enjoy the service programs and this was the first one offered in Yellowstone. We have worked in several other national parks. We also enjoy the programs managed by U of Montana Western. We also like the tax deductible component.

CODING CATEGORY 6: Elderhostel Participants Opportunity for Socializing (n=15)

Participants who checked Opportunity for Socializing as the answer to “When you think of being in an educational program, do you think of it primarily as...?” also wrote these answers to “Why did you select this particular program?”

- My neighbor asked if I'd I would be interested. It sounded nice, so I went.
- Ski with other people my age and topic of Van Van Gogh was interesting to me.
- Golf.
- Place and outdoor activities.
- I am a library media specialist in an elementary school in Virginia. The 4th grade studies VA history in depth and 6th grade reviews it, so this seemed perfect way to first experience Elderhostel, business and pleasure.
- I enjoy deserts and also wanted to see the various places we visited.
- I am fascinated by medicine and graduated with a BS in biology. Thus biology, genetics, chemistry and their modern uses in law enforcement and archeology interest me. I also wanted to see how authentic the "CSI" program really was.
- Active and outdoors in a beautiful location. Affordable!

- We love to bird! We had never been to Baja before!
- Interest in art history; workable dates; location.
- Length/covered both countries w/variety of activities, including museums, hikes, lectures, local cultural programs, nature/ecology.
- I was visiting that area during that time and wanted to do something for New Year's Eve.
- I wanted to see New Zealand. I wanted to take a grandchild on a trip.
- It interested me; sailed lake and ocean for years; love Maine especially Coast.
- Though I live in NY, I was visiting in Hawaii for holidays, and San Francisco was good stopover where I met up with friends from SD, whom I'd met at a "poetry" Elderhostel the previous April! I love Gershwin and they teach college social studies so King and Queens of England.

CODING CATEGORY 1: University of Montana Participants Educational Experience (n=19)

Participants who checked Educational Experience as the answer to “When you think of being in an educational program, do you think of it primarily as...?” also wrote these answers to “Why did you select this particular program?”

University of Montana Participant Educational Experience Comments:

- Alumni friends
- Price, friends
- Be with friends; a warm place in the winter; the real need to relax without any commitment, right price at the right time. AND my husband would go along.
- Lecturers on the bus and smart people to talk to.
- My grandparents were Scots.
- Family.
- Interested in art and architecture.
- U of M sponsored. Lots of alum friends on board.

- Amalfi Coast and Capri.
- Grandparents from Croatia.
- We had not been to Holland. It was a small group of people our age and similar backgrounds. Having a guide was helpful.

CODING CATEGORY 2: Univ. of Montana Participants Recreation or Leisure
(n=17)

- U of M sponsored. Lots of alum friends on board.
- Alumni friends.
- Family
- Amalfi Coast and Capri
- Retirement gift to self
- Social, rec. photo and diving opportunity
- David McCullough as a guest lecturer

CODING CATEGORY 3 University of Montana Participants Vacation (n=19)

- Vacation with family.
- New Place.
- Price, friends.
- U of M sponsored. Lots of alum friends on board.
- Retirement gift to self.
- Wanted to see China, the country and the people.
- An area we had never visited when we lived in Europe and interest in poets and authors.

- Knew people going.

CODING CATEGORY 4: University of Montana Participants Opportunity for Service Learning (n=3)

- Price, friends

CODING CATEGORY 5: Elderhostel Participant Opportunity for Volunteering (n=3)

- Financially appropriate
- U of M sponsored. Lots of alum friends on board
- Price, friends

CODING CATEGORY 6: University of Montana Participants Opportunity for Socializing (n=6)

- Fun
- Be with friends; a warm place in the winter; the real need to relax without any commitment, right price at the right time, AND my husband would go along.

