

6-2-2016

A Comparative Analysis of Demographics and Reported Preferential Learning Modes of Florida and non-Florida Osher Lifelong Learning Institutes Members

Jung Min Lee

University of South Florida, jungmin18@gmail.com

Follow this and additional works at: <https://digitalcommons.usf.edu/etd>



Part of the [Adult and Continuing Education and Teaching Commons](#), and the [Educational Administration and Supervision Commons](#)

Scholar Commons Citation

Lee, Jung Min, "A Comparative Analysis of Demographics and Reported Preferential Learning Modes of Florida and non-Florida Osher Lifelong Learning Institutes Members" (2016). *USF Tampa Graduate Theses and Dissertations*.

<https://digitalcommons.usf.edu/etd/6297>

This Thesis is brought to you for free and open access by the USF Graduate Theses and Dissertations at Digital Commons @ University of South Florida. It has been accepted for inclusion in USF Tampa Graduate Theses and Dissertations by an authorized administrator of Digital Commons @ University of South Florida. For more information, please contact digitalcommons@usf.edu.

A Comparative Analysis of Demographics and Reported Preferential Learning Modes of
Florida and non-Florida Osher Lifelong Learning Institutes Members

by

Jung Min Lee

A dissertation submitted in partial fulfillment
of the requirements for the degree of
Doctor of Philosophy in Curriculum and Instruction
with an emphasis in Adult Education
Department of Leadership, Counseling, Adult, Career, and Higher Education
College of Education
University of South Florida

Major Professor: William H. Young III, Ed.D.
Wayne B. James, Ed.D.
Jeffrey D. Kromrey, Ph.D.
Edward Fletcher, Ph.D.

Date of Approval:
May 17, 2016

Keywords: Older adults, Technology use, Social network, relocation after retirement

Copyright © 2016, Jung Min Lee

Table of Contents

List of Tables	iv
List of Figures	v
Abstract	vi
Chapter 1: Introduction	1
Background of the Problem	2
Statement of the Problem	3
Purpose of the Study	5
Research Questions	6
Conceptual Framework	7
Adult development stage theory	7
Third age	9
Why older adults participate in higher education	10
Importance of the Study	12
Delimitations	13
Limitations	13
Definition of Terms	14
Course delivery methods	14
Osher Lifelong Learning Institutes (OLLI)	14
OLLI individual centers	14
OLLI National Resource Center (NRC)	14
Preferential learning mode	14
Profile	15
Relocation after retirement	15
Social media networks	15
technology usage	15
Organization of the Study	15
Chapter 2: Literature Review	17
A Brief History of Lifelong Learning in United States	17
Motivation Factors for Older Adult Participation in Lifelong Learning	19
Another model of successful aging	21
Motivation factors	22
Participation Trends and Patterns in Adult Education: 1990-1999	22
Learning Goals for Participation in Lifelong Learning for Older Adults	24
Older Adults and Technology Use	25
Elderhostel	26
Road Scholar: Member Survey 2014	27
SeniorNet Tampa 1993-2000	28

The Learning in Retirement Institute (LIR), 1994-2004	29
OLLI-USF.....	30
Pilot Study Results of OLLI-USF	31
Gap Statement	32
Chapter Summary	34
Chapter 3: Methods	35
Population and Sample	35
Sample size	36
Instrumentation.....	36
Demographic and behavioral trends survey	36
Reliability.....	37
Content validity	37
Data Collection	38
Data Analysis.....	40
Goodness-of-fit test	41
Summary	41
Chapter 4: Findings	42
Demographic Characteristics of the Sample	42
Research question 1	42
Comparison Between Florida and Non-Florida OLLI Members.....	45
Research question 2.....	45
Reported Preferential Learning Modes.....	48
Research question 3.....	48
Preference of technology.....	48
Social media network preference	50
Facebook	51
Linkedin, Instagram, Youtube, or other photo or video sharing site	51
Course delivery mode.....	52
Relocation after retirement	53
Subject preference.....	54
Summary	59
Chapter 5: Summary, Discussion, Conclusions, Implications, and Recommendations	60
Summary	60
Discussion	61
Conclusions	62
Implications.....	65
Adult education field	65
Administrators	65
OLLI members	67
OLLI instructors.....	68
Recommendations for Future Research.....	68

References	71
Appendices.....	79
Appendix A: National Survey	80
Appendix B: Florida OLLI Survey, 2015	84
Appendix C: Sample Size Table	88
Appendix D: Results of Reliability Test.....	89
Appendix E: IRB Approval Letter	90
Appendix F: Email Reminder to the OLLI Members	92
Appendix G: Email to the Florida Directors to Explain the Research and Included Results of the Pilot Study of OLLI-USF	93
Appendix H: Figures for Comparison Between Non-Florida and Florida OLLIs	95
Appendix I: List of Other Comments on Preference of Technology Usage	102
Appendix J: List of Other Comments on Preference of Social Network	103
Appendix K: List of Other Comments on Preference of Subject Areas	104
Appendix L: Lists of Florida Osher Lifelong Learning Institutes	105
Appendix M: Demographics of Florida from Census 2015	106
About the Author	End Page

List of Tables

Table 1:	Florida OLLI Membership: Composite Demographic Distribution	44
Table 2:	National and Florida Data of Technology Preference and Course Delivery Mode	50
Table 3:	National and Florida Data of Preference for Relocation After Retirement.....	54
Table 4:	Most Popular Topic Areas for OLLI Courses	58
Table 5:	Subjects Ranking of National and Florida	59
Table C1:	Sample Size Based on Effect Size, Alpha, Power, and Degree of Freedom with Variables (IVs).....	88
Table D1:	Results of Reliability Test Includes Each Answer Option.....	89
Table I1:	List of Other Comments on Preference of Technology Use.....	102
Table J1:	List of Other Comments on Preference of Social Media Network.....	103
Table K1:	List of Other Comments on Preference of Subject Areas	104
Table L1:	Lists of Florida Osher Lifelong Learning Institutes	105
Table M1:	Demographics of Florida from Census 2015.....	106

List of Figures

Figure H1:	Comparison between national and Florida age difference	95
Figure H2:	Comparison between national and Florida marriage status	95
Figure H3:	Comparison between national and Florida study educational level.....	96
Figure H4:	Comparison between national and Florida employment status	96
Figure H5:	Comparison between national and Florida number of years after retirement.....	97
Figure H6:	Histogram of data in technology usage	97
Figure H7:	Histogram of data in social networking	98
Figure H8:	Histogram of data in participating MOOC	98
Figure H9:	Histogram of data in participating 100% online	99
Figure H10:	Histogram of data in participating blended class	99
Figure H11:	Histogram of data in preference of relocation after retirement	100
Figure H12:	Histogram of data in major factor of relocation after retirement.....	100
Figure H13:	Histogram of data in subject preference	101

Abstract

This research examined demographic factors and reported preferential learning mode among a sample of Florida Osher Lifelong Learning Institute (OLLI) members compared to a national sample profile of OLLI members. This study was prompted by an earlier study of OLLI members conducted by the National Resource Center (NRC) for OLLIs, which produced a national profile describing OLLI members. Although there was a national profile for OLLI members, there were no existing profiles of Florida OLLI members that could be used by OLLI administrators and instructors.

This study employed an online survey to compare data between the national OLLI member profile and the Florida profile. Demographic factors such as age, gender, marital status, educational level, employment status, and relocation after retirement, as well as reported preferential learning mode were compared. The data resulting from this comparison indicated that although the gender and marital status distributions of the sample participants were similar, a majority of the other demographic variables were different for the Florida and national OLLI samples. The reported preferential learning mode between national and Florida OLLI members also were significantly different, in contrast to earlier research, which suggested that OLLI members were a homogenous group. The findings from this study suggest that it is important for adult education field educators, administrators, and OLLI instructors to recognize the growing diversity and technical proficiency of current retirees in order to continue to promote effective lifelong learning practices.

Chapter 1

Introduction

An increased lifespan has given many Americans an opportunity for productive engagement in their continued growth and development as both individuals and members of society. As Lakin, Mullane, and Robinson (2007) explained in the *Framing New Terrain* report, individuals in this *third age*—adults in their 60s, 70s, and even 80s—look for lifelong learning courses in order to improve their knowledge and job skills in order to continue to work after retirement.

According to the *Framing New Terrain* report (Lakin et al., 2007), there has been much research conducted on why older adults participate in higher education (Fullerton, 1999; Kleiner, Carver, Hagedorn, & Chapman, 2005; Lamb & Brady, 2005; Silverstein, Choi, & Bulot, 2002; Toft & Jeserich, 2006). The *Framing New Terrain* report also emphasized major implications for older adults' participation in higher education. One of the indicators of active aging was identified as participation in a learning program resulting in a community-involved lifestyle for seniors (Davey, 2002).

There are over 500 lifelong learning institutes in the United States according to Lamdin and Fugate (1997). These Lifelong Learning Institutes (LLIs) started with Elderhostel and Learning in Retirement (LIR) programs. Since 2000, Osher Lifelong Learning Institutes (OLLI) have emerged as organizations targeted for individuals in the third age (Lakin et al., 2007).

The mission of the Osher Lifelong Learning Institute (OLLI) is to provide a curriculum of intellectually stimulating learning opportunities and special activities for people 50 years of age or older (Lamb & Brady, 2005). Lamb and Brady (2005) focused on describing OLLI participants and provided data on the sources of their technology use and their preferred subject areas, as well as their preferred learning methods. The following section provides a general background of the type of available information related to OLLI members, their needs in the United States, and the effects of this information on curriculum design.

Background of the Problem

The Bernard Osher Foundation and the National Resource Center (NRC) for OLLIs held a national conference for OLLIs at the Park Hyatt Aviara in Carlsbad, California from April 28-30, 2014. One of the research studies presented was a *Pilot National Survey of OLLI Membership* by Brady and Hansen (2014) in conjunction with Carnegie Mellon. The OLLI at Carnegie Mellon has been noted for its use of data-based decision making relative to membership, programs, and curricula.

The Brady and Hansen (2014) OLLI membership survey involved a total of 2,989 participants in eight different OLLI programs of different sizes, with varying ages of program participants, and located in geographically diverse parts of the country. The National OLLI research participants represented OLLI programs in the following universities: University of Southern Maine, University of Connecticut, Furman University in South Carolina, University of Kansas, Colorado State University, University of California at Irvine, the University of California at San Francisco, and Boise State University. Brady and Hanson (2014) performed an analysis of composite results with

an emphasis on segmenting responses by age. Particular attention was paid to data showing employment, relocation, technology utilization, and course preference trends.

Brady and Hansen (2014) conceived the idea for their presentation based on outcomes from the 2012 OLLI National Conference. At that conference, there was a round table session during which the participants were asked to identify areas for possible exploration in future research. Two topic areas brought forth were: (a) changing retirement patterns and (b) new learning modalities, such as online courses—especially using blended learning formats. This was the first time that several OLLI programs agreed to collaborate in a study and administer the same instrument to their members so that the resulting data could be compared.

In this study, the results from Brady and Hanson's (2014) survey of non-Florida OLLI membership were compared with results from a survey of four Florida OLLIs (University of North Florida, University of South Florida, Eckerd College, and the University of Miami) including a comparison of trends of technology use and modalities of course delivery.

Statement of the Problem

According to the *World Population Aging Report* (2013), the global population of people over age 60 will double in the next few decades. In 2013, there were 841 million people in this demographic; by 2050, there are expected to be more than two billion. As Lakin et al. (2007) explained, this growth in the population of older adults “presents challenges not only for the U.S. workforce, but for colleges and universities as well” (p. 2). Their report confirms that Florida should continue to anticipate having one of the highest populations of senior citizens in the United States. With life expectancy at 78

years and rising (Miniño, Heron, & Smith, 2006) and an average retirement age at 62 (Gendell, 2001), the number of these older adults and their needs will continue to increase.

OLLIs, as a part of higher education, could ensure continuing education opportunities for this population. Yet, there has been little research identifying the group profiles of elder lifelong education participants in Florida. In particular, there had been little information regarding their preferences for course location, technology utilization, and course delivery methods. No comprehensive studies had been conducted during the last decade that have researched the preferences for technology use, course delivery, and topic preferences of OLLI members, and this information, along with information regarding preferences for relocation after retirement, could help OLLI administrators with future decisions regarding program design and delivery.

Florida, which has one of the highest populations of senior citizens, was not included in the *Pilot National Survey of OLLI Membership* conducted by Brady and Hanson in 2014. The *Demographic and Behavioral Trends Survey*, the instrument utilized for the *Pilot National Survey of OLLI Membership*, is contained in Appendix A. Current OLLI administrators in Florida, however, seemed to have recognized the importance of having this type of member information.

According to the University of South Florida (USF) website, Innovative Education “meets the needs of learners any time and any place through innovative distance learning, continuing education, degree completion, certificate, workforce development, lifelong learning, and pre-college programs” (USF Innovative Education, 2016, para. 1). In 2014, there were over 1,300 older adults who were OLLI members (A. Rogers,

personal communication, October 3, 2014). Most of the OLLI classes were presented using face-to-face teaching and learning activities, and were taught by volunteer instructors who were typically other older adults. Many OLLIs that once used printed marketing materials in the past are now focusing on social media or online materials to attract younger retirees (A. Rogers, personal communication, October 3, 2014).

A 2011 survey conducted by OLLI-USF indicated that most OLLI-USF members took courses for intellectual stimulation (Rogers, 2011), which reflected the same finding revealed in the national survey. The 2011 survey was a tool used to understand the Florida OLLI organization's member characteristics and how they preferred to receive information about available programs. While this survey provided useful information to one program, there has been no research conducted during the last two decades comprehensive enough to be used to develop a complete profile of Florida OLLI members, and to then compare that profile with a national sample profile of OLLI members.

Purpose of the Study

The purpose of this research was to identify the profile of OLLI members and compare the differences between non-Florida and Florida institutes. The issues which were compared included relocation after retirement, usage of technology, and social network utilization related to current and future OLLI courses (areas of course interest and course delivery methods). Many recent studies have found that social network size (the number of people seen at least once a month) is inversely related to the risk of cognitive impairment (Barnes, Mendes de Leon, Wilson, Bienias, & Evans, 2004; Bennett, Schneider, Tang, Arnold, & Wilson, 2006; Gow, Pattie, Whiteman, Whalley, & Deary, 2007).

This study used the *Demographic and Behavioral Trends Survey (DBTS)*, created by Brady and Hanson (2014); however, to gain additional information, four open-ended responses were added. See Appendix B for a copy of the DBTS with the four open-ended responses. The DBTS was originally created to determine how many OLLI members had experienced online classes, as well as their social media preferences and their abilities to use technology (Brady & Hanson, 2014). It referenced social media marketing tools such as Facebook or LinkedIn, and examined use of technologies such as laptops, desktop computers, and smart phones. Brady and Hanson's (2014) research focused specifically on access to technology within the adult population who were 55 years and older.

This study employed an online version of the modified DBTS in order to achieve similar goals of Brady and Hanson (2014), as well as others. The survey in this study was used to identify a profile of Florida OLLI members' most popular topics for classes and their perceptions of the benefits of taking OLLI classes. In addition, the survey was used to identify socio-demographic factors.

Research Questions

The purpose of this research was to identify the profile of OLLI members and compare the differences between non-Florida and Florida institutes. In this research, the issues which were compared included relocation after retirement, usage of technology, and social media network utilization related to current and future OLLI courses (areas of course interest and course delivery methods). The study addressed the following research questions:

1. What is the Florida profile of Osher Lifelong Learning Institute (OLLI) members?

2. How does the national profile of OLLI members compare to the Florida profile of OLLI members in terms of demographic variables such as age, gender, marital status, educational level, and employment?
3. How does the national profile of OLLI members compare to Florida profile of OLLI members in terms of reported preferential learning modes such as preference for technology use, course delivery and course topics?

Conceptual Framework

Educators involved in designing programs for adults historically have been cognizant of life-stage characteristics and age-related changes in adulthood. The ultimate goal of adult development is “to increase adaptation of the organism to its environment which is achieved through learning” (Blanchard-Fields & Kalinauskas, 2009, p. 3). The conceptual framework for this study is based primarily upon adult stage development theory and the function of continuing education in promoting personal and professional development within an adult elderly population.

Adult development stage theory. Erikson (1959) asserted that adulthood continues to proceed in stages of development throughout the life cycle. The stages of adult life are characterized not by growth in physical capacities, but by steps in psychological and social growth. He defined a sequence of eight stages that defines how life unfolds. Each stage is associated with a specific psychological struggle that shapes a major aspect of individuals’ personalities (Gail, 2006). The last stage is *ego, integrity vs. despair* for people who are over 65 years old. According to Erikson, people in this stage reflect upon their accomplishment. People can develop in two ways: Those

who are satisfied with their goals develop integrity and those who are dissatisfied with their goals develop despair.

Other theorists and researchers have also divided adult life into stages or phases. Merriam and Caffarella (1999) divided adult development into four areas: biological, psychological, socio-cultural, and integrative, whereas Baumgartner (2001) asserted that behavioral/mechanistic, cognitive/psychological, contextual/socio-cultural, and integrative are four lenses for adult development. The study of these stages helps adult educators to understand students' readiness to learn associated with the aging process, as well as helps to highlight opportunities for *teachable moments* for returning students.

Havighurst (1972) asserted that learning is a continuous process that occurs during all stages of life in order to solve problems or as a process of self-development. He believed that people encounter various problem-solving tasks throughout their lives. He asserted that if individuals accomplish these tasks, they then will have positive self-esteem, which, in turn, builds a good foundation in late life stages.

McClusky (1974) suggested that the elderly, in general, are active, intelligent, and involved people who have positive feelings about themselves and their potential. He demarcated between needs and wants for survival, and also proposed five different types of needs that motivate older adults. He stated:

Coping needs [emphasis added] are related to how one manages changes brought about by ageing. *Expressive needs* are needs to engage in meaningful and developmental activities. *Contributive needs* are the desires to make contributions to others and society. *Influence needs* refer to the intentions of elders to exert a positive influence on others and the environment. Finally, *transcendence needs* are the needs to rise above the age-related limitations. (Tam, 2014, p. 812)

Cohen (2005) identified four developmental phases of the mature brain—midlife re-evaluation, liberation, summing up, and encore, which offers hope for millions of elderly lifelong learning learners who wish to remain vital to the end. To put all this into a developmental context, Cohen (2005) extended and deepened the common final old age stage into four phases. The first stage is re-evaluation (from the mid-thirties to the mid-sixties), which is when we realize our mortality and reconsider our lives. Liberation occurs from the mid-fifties to the mid-seventies, when people experience new ways of thinking about unsolved tasks. This is followed by the summing up stage (from the late sixties through the eighties), when people seek to share, give something back, and complete unfinished business. Finally, people reach the encore stage during the late seventies onwards, when major life themes are re-stated and re-affirmed.

Third age. According to Laslett (1996), the definition of the *third age* is a “period of personal fulfillment” (p. 4) in late adulthood. The University of the Third Age (U3A) originated in France and spread throughout Europe and then to the United States. U3A was born primarily from the ideas of Vellas (1972), who recognized the combined vitality and longevity of many older adults in France and believed that universities should promote a combination of instruction for seniors plus gerontological research that improves the life of older adults (Philbert, 1984; Radcliffe, 1984; Vellas, 1997).

The first U3A was established in Toulouse, France, and was opened to anyone over retirement age who could fill in a simple enrollment form and pay a nominal fee. The learning activities were scheduled for daylight hours, five days a week, for eight or nine months of the year. Adult educators from France and Britain issued an educational manifesto that was to be the heart of the British U3A movement in 1979. U3A is a highly

successful adult education movement that provides opportunities for older adults to enjoy a range of activities associated with well-being in later life.

Why older adults participate in higher education. The *Framing New Terrain* report (Lakin et al., 2007) described several research studies which explored why older adults participate in higher education (AARP, 2000; Kleiner et al., 2005; Lamb & Brady, 2005; Lamdin & Fugate, 1997; Manheimer, 2005; Silverstein et al., 2002). This report provided profiles of older adults who were between 55 and 79 years old and how they spent their time after retirement in order to remain active in all facets of their lives. The report described their motivating factors “for participating in higher education, and the obstacles that prevent broader participation” (Lakin et al., 2007, p. 3). The findings indicated that there was a strong demand for job-related training that can be put quickly into use. In reviewing this research, there were three motivating factors: intellectual stimulation, fun (enjoy learning), and staying current.

Lakin et al. (2007) presented an American Association of Retired Persons (AARP) survey from the year 2000 that included 1,000 respondents aged 50 years and older. Of those who participated, 90% identified their motivations for continuing education as (a) a desire to keep up with what is going on in the world, (b) to enhance their own spiritual or personal growth, and (c) to enjoy the satisfaction of learning something new. In another survey of 860 adults (aged 55 to 96 and were involved in a range of lifelong learning activities), 8 out of 10 respondents also cited the pleasure they got from learning as a motivating factor (Lamdin & Fugate, 1997).

Lakin et al. (2007) also revealed how important the ability to use new skills they had learned in order to work was in the lives of older adults. They stressed the

importance of higher education in retooling current job skills or in gaining new knowledge in order to continue working, even during the traditional retirement years.

Although this finding was not expected, it is no longer unusual. In an AARP survey of baby boomers, for example,

15 percent of respondents who intend to continue working expected to start a new business, while 7 percent planned to work full-time in a new career. In addition, 30 percent would like to work part-time for enjoyment, and 25 percent for needed income. (AARP, 2004, as cited in Lakin, Mullane, & Robinson, 2007, p. 4)

These older adults wanted to work either for income, service, or enjoyment and they took lifelong learning courses in order to achieve this goal.

A Merrill Lynch survey from 2006 showed that “71 percent of Americans aged 25 to 70 said they hoped to continue working past their expected retirement age” (Lakin et al., 2007, p. 4). Lakin et al. (2007) also reported there were increasing numbers of older adults who continued to work or who would seek additional education that would allow them to pursue a new career. For these older adults, obtaining a degree was not important.

Correspondingly, the AARP survey from the year 2000 concluded that more than half of the total respondents participated in lifelong learning to improve their job skills. The younger respondents were more likely to pursue education for this reason as well, but were also more likely to attempt to earn a new degree or certification.

According to Lakin et al. (2007), location is one of the influencing factors of older adult learning and work. Geography is one of the variables among the so-called demographic barriers (Lakin et al., 2007). Older adults in urban areas joined OLLI courses in order to engage other older adults socially and intellectually. However, older

adults in rural areas do not always have opportunities to take OLLI classes, or the classes that are offered may not directly benefit older adults in rural areas. Therefore, geographic location may often constrain older adults in participation in lifelong learning in higher education.

Importance of the Study

In order to understand of the profile of Florida OLLI members, this study was deemed necessary because the national survey of OLLI members did not include Florida OLLI institutes. As of 2014, the OLLI at the University of South Florida (USF) had 1,300 members itself (A. Rogers, personal communication, October 3, 2014). This research contributed to the adult education field by providing information about how lifelong learners seek learning experiences and what kinds of benefits they are hoping to obtain from additional education after they retire. This research may help administrators in marketing their course by engaging social media outlets more often and it may help OLLI instructors in planning their methods of course design and delivery. Both of these activities may ultimately improve services to OLLI members.

This study contributed to a broader understanding of OLLI members in the adult education field. The results may assist administrators in developing an approach to determining the most appropriate times and locations for programs for retirees. It may also increase administrator awareness regarding retirees' preferred learning topics.

According to an AARP report (2000), adult learners are most interested in learning about subjects that could improve the quality of their lives, build upon a current skill, or enable them to take better care of their health. Six topics generated the greatest interest: (a) a favorite hobby or pastime (62% extremely or very interested), (b) advanced skills (52% extremely or very interested), (c) getting more enjoyment or

pleasure out of life (51% extremely or very interested), (d) having a healthy diet and nutrition (49% extremely or very interested), (e) measuring personal health status (48% extremely or very interested), and (f) managing stress (46% extremely or very interested). The results of this study may be used as recommendations for future program design and delivery methods of teaching to members of the OLLI.

Delimitations

This study targeted approximately 6,887 Florida OLLI members who took OLLI courses during the 2014-2015 fiscal year. The list of potential participants was obtained from a database maintained by the directors of Florida OLLI organizations who participated in the study. Because a limited pool of participants existed, a convenience sample was utilized; therefore, the non-Florida and Florida study participants were not randomly selected. Only OLLI members who volunteered to take the online survey through their OLLI institutes were included. This research only studied OLLI members and was not intended to be an investigation of older adult years in general, nor was it designed to capture the quality of practices being used in teaching older adults.

Although there are six OLLI institutes in Florida, only four of these institutes participated. Florida State University (FSU) and Florida International University (FIU) declined participation in this research. The OLLI members who participated in the study were those only who attended OLLI courses in the 2014-2015 fiscal year.

Limitations

As a quantitative exploratory study conducted through a web-based instrument, this study was prone to limitations. It only captured limited information pertaining to the use of technology, favorable social networking sites, experience with e-learning, current

employment status, geographic moves, and the participants' most interesting course subjects. Thus, the quantitative data may not have fully captured as much rich and detailed information as expected from other qualitative methods.

Definition of Terms

The following terms provided a guide for this study, allowing a more comprehensive examination of the identified research questions. Although there are many ways of defining these terms, the following definitions were relevant for the present study:

Course delivery methods includes presentation methods which may be utilized by older adults. May include online, blended, or face-to-face classes.

Osher Lifelong Learning Institutes (OLLI) are institutes that were founded by the Bernard Osher Foundation which seeks to improve quality of life through support for higher education and the arts (The Bernard Osher Foundation website, 2014).

OLLI individual centers. One unit of the Osher Lifelong Learning Institutes. There are 119 individual centers of OLLIs in the United States based on the Bernard Osher Foundation grant and their organization membership fee in a higher education setting for training older adults.

OLLI National Resource Center (NRC). The OLLI NRC is an organization that conducts OLLI research and the promotion of best practices.

Preferential learning mode. Preferential learning mode is a preference for specific learning inclinations toward different means of technology use, course delivery, relocation after retirement, and topics of interest in the higher education setting.

Profile. Profile is an aggregate of individual characteristics of participants, including demographics (gender, education background, marital and economic status), preferred topics, social media networks, and technical usage.

Relocation after retirement. The decision to move to another location after retirement that is influenced by the availability of an OLLI program.

Social media networks. Tools for social interaction among people in which they create, share or exchange information and ideas in virtual communities and networks such as Facebook, LinkedIn, or Google Plus.

Technology usage. The equipment and methods which older adults use, including desktops, laptops, iPads, smart phones, e-books, and tablets.

Organization of the Study

This study is presented in five separate but related chapters. Chapter 1 presented an introduction to the study. It included the background of the problem, statement of the problem, the purpose of the study, research questions, conceptual framework, importance of the study, definitions, limitations, definitions of terms used in this study, and the organization of the study.

Chapter 2 is a review of the literature related to this research study. It incorporates information related to the history of lifelong learning in United States and motivation factors for older adult participation in lifelong learning; participation trends and patterns in adult education: 1990-1999; learning goals for participation in lifelong learning for older adults; older adults and technology use, specifically regarding history of Elderhostel; Road Scholar: Member Survey 2014, SeniorNet Tampa 1993-2000; the

Learning in Retirement Institute, 1994-2004; OLLI-USF, pilot study results of OLLI-USF, a gap statement; and a summary.

Chapter 3 illustrates the methods used for this study. It incorporates the procedures used in this study, including the research design, population and sample, instrumentation, data collection, data analysis, and summary.

Chapter 4 introduces the study's findings. It examines the demographic profile of the survey respondents and comparison between national and Florida OLLI members in terms of relocation after retirement, usage of technology, and social media network utilization related to subject preference and course delivery methods, and summary.

Chapter 5 provides an overview of the research. It incorporates the summary of the study, the discussion, conclusions, implications, and recommendations for further research.

Chapter 2

Literature Review

The purpose of this research was to identify the profile of OLLI members and compare the differences between non-Florida and Florida institutes. The issues which were compared included relocation after retirement, usage of technology, and social media network utilization related to current and future OLLI courses (areas of course interest and course delivery methods). The current OLLI profile does not include any Florida institutes because Brady and Hanson (2014) selected eight programs based on geographic diversity, university size, and some degree of convenience (e.g., OLLI research review panel affiliations).

A Brief History of Lifelong Learning in United States

The pre-retirement education movement in the 1950s and 1960s, with the goal of preparing older adults for their retirement, introduced the idea of learning in later life. In the United States, the 1960s started a shift in the perception of old age and a new view of post-retirement life after the noticeable growth in the older population (Cross, 2014). Seniors were viewed as needing to develop the knowledge and skills to cope with the aging process, and educational programs offered a solution (Manheimer, 2005). In 1962, a group of 152 New York City retired schoolteachers founded a “scholarly” learning community in Greenwich Village at the New School for Social Research, which is now known as the New School University (Aybar-Damali, 2007).

The Older Americans Act of 1965 allowed for government funding of multipurpose senior centers across the United States. One of the main goals of the Older Americans Act was to create centers that would enhance the wellbeing of the older adults in the community by offering a large variety of services including social, recreational, and health services (Manheimer, 2005; Pardasani and Thompson, 2012).

This learning community was called the Institute for Retired Professionals and was the first known formal Lifelong Learning Institute (LLI). Throughout the 1960s and 1970s other colleges and universities replicated or adapted the Institute for Retired Professionals' lifelong learning model (Manheimer, Snodgrass, & Moskow-McKenzie, 1995; Kim & Merriam, 2004; Lightfoot & Brady, 2005). Lifelong Learning Institutes, alternatively called Institutes for Learning in Retirement or Learning in Retirement Institutes (LIR), are organizations of older learners, sponsored by a host campus.

In 1976, The Mondale Bill, also known as the Lifetime Learning Act, was presented as an amendment to the Higher Education Act of 1965. It was the first legislative act that included the concept of lifelong learning and marked the establishment of lifelong learning in the United States. (Jarvis 2010). The Lifelong Learning Act defined lifetime learning as follows:

Any program, project, activity, or service designed to meet the changing educational needs of Americans throughout their lives, and includes, but it not limited to, adult basic education, postsecondary education, continuing education, or remedial education special educational programs for groups or for individuals with special needs, job training programs, and preretirement and post retirement training, and education programs for the elderly." (S. 2497, 1975)

At retirement age, many baby boomers sought training for a new career, explored old or new hobbies, or looked to fulfill the need for social interaction; a Lifelong

Learning Institute is an option for them. Lifelong Learning Institutes offer a unique educational opportunity in which peer learning, where learners learn from their classmates is utilized and where collaborative leadership and active member participation are fundamental (Einstein, 2008).

Along with a significant increase in older people, the concept of lifelong learning also began shifting as the 20th century came to an end (Hunt, 2006). In the fall of 2000, the Osher Foundation began to consider programs targeted toward more mature students, not necessarily well-served by the standard continuing education curriculum (Einstein, 2008).

Motivation Factors for Older Adult Participation in Lifelong Learning

Most of the studies of lifelong learning learners have been focused on motivational variables (Kim & Merriam, 2004; Lamb & Brady, 2005; Lakin et al., 2008; Narushima, 2013; Szücs 2001; Wolf, 1985). Studies going back to 1971 are generally consistent in reporting that cognitive interest (desire to know) is among the most often cited reasons expressed by older learners for participation in adult education. Kim and Merriam (2004) conducted a study to identify the motivations and benefits of older adult participants in a Learning in Retirement Institute (LIR). Data was collected from 189 members of an institute located in the southeastern United States. Kim and Merriam (2004) discussed learning motivations in older adults and included their cognitive interests or stimulations.

Lamb and Brady (2005) investigated the perceived benefits of participation in a peer-governed and peer-taught elder learning program. Lamb and Brady (2005) interviewed 45 OLLI members over the course of six focus groups that lasted a total of

90 minutes. They found that seniors reported higher levels of self-esteem as a result of their involvement with the program. The benefits reported were observed in four specific areas: intellectual stimulation, experiencing a nurturing and supportive community, enhancing self-esteem, and having opportunities for spiritual renewal. These were the factors that “interested” participants and caused them to return year after year; therefore, establishing friendships and other social factors, which were also indicated as important motivators (Kim & Merriam, 2004; Lamb & Brady, 2005).

Research also indicated that older learners are often motivated to engage in learning experiences in order to develop social relationships as well as to acquire knowledge for intellectual stimulation (Boshier & Riddell, 1978; Bynum & Seaman, 1993; Daniel, Templin, & Shearon, 1977; Kim & Merriam, 2004; Martin, 2002). An especially useful and more recent project, *Reinvesting in the Third Age: Older adults and higher education* was conducted by the American Council of Education, resulting in two reports by Lakin et al. (2007, 2008). A national survey was conducted in higher education focused on adults ages 55 to 81 and held round-table discussions with higher education and government leaders. The *Mapping new directions: Higher Education for Older Adults* study (Lakin et al., 2007, 2008) found three primary motivators for older adults returning to school:

1. Learning to learn (the joy of learning). Older adults wanted to pursue learning related to improving the quality of their lives and how they could manage aging. Continued learning was, for many, a rejuvenating experience. Survey results indicated that higher education institutions reported arts and humanities courses as the most

popular among older adults, with work-related courses, such as business management and entrepreneurship, a close second.

2. Learning to connect (meeting new people in their communities). Older adults wanted to meet and engage with others to learn about other cultures and groups outside of their own small familiar communities; they did not want to be isolated. They preferred intergenerational learning where both young and old shared and learned from each other.

3. Learning to work (advance careers or pursue new careers). Some older adults wanted to pursue second careers different from the careers that provided them income, while many continued to work just to survive in the current economy. Education was seen as very important with respect to these older adult career goals.

These three motivators suggested that educational experiences should encourage older adults to get to know one another whenever possible (Duay & Bryan, 2006; Hiemstra & Sisco, 1990; Peterson, 1983). However, beyond the social aspects, the findings indicated that effective adult learning was keeping the participants active and involved with the world.

Another model of successful aging. According to Rowe and Kahn's (1998) model of successful aging, active engagement with life is an essential ingredient to growing older in a positive, healthy manner. They stated, "The fact is we need continued contact with others, and the lack of such social relations is damaging. Loneliness breeds both illness and early death" (p. 156). Clearly, learning plays an important role in maintaining, or even enhancing, cognitive ability. However, the findings of this study

suggest that the role of learning in older adulthood goes beyond a positive impact on cognitive processes to active engagement with the world around them.

Motivation factors. Fisher (1983) found a variety of motivation factors (e.g. previous educational experiences, self-assurance in relationships with others, tendency to engage in self-directed learning activities, knowledge of the availability of educational programs, and topics of interest for future learning) as well as complexities in formal education programs that influenced older adults' participation in higher education. Wolf and Fisher (1998) edited a useful sourcebook that provides adult and continuing educators with information about theory and research in educational gerontology along with information about the practice of older adult learning and education. Older adults also needed skills to cope with age-related concerns such as leisure, retirement, health, death, housing, and finances (Fisher & Wolf, 1998).

Participation Trends and Patterns in Adult Education: 1990-1999

U.S. Department of Education, Office of Educational Research and Improvement (2002) provided an overview of adult participation in formal learning activities (e.g., courses and programs) during the 1990s, focusing on trends in participation over time and patterns of participation. The report replicated previous studies' findings of an overall increase in participation rates based on age, gender, race/ethnicity, education level, labor force status, and occupation group. The report extended these findings by examining trends over time in which groups of adults participate in adult education, and by providing a more detailed view of participation patterns in specific types of adult education, including the underlying determinants of these patterns.

The data for this report came from the 1991, 1995, and 1999 Adult Education Surveys conducted as part of the *National Center for Education Statistics' National Household Education Surveys Program*. In these surveys, adults were defined as all civilian, non-institutionalized individuals, age 16 years or older at the time of the survey. Adult education activities included adult basic education and English as a Second Language courses; apprenticeship programs; some programs leading to a formal credential; courses taken for work-related reasons; and courses taken for reasons other than work. Since the continuous pursuit of formal education is typically not considered adult education, in this report, full-time participation in postsecondary credential programs by those ages 16-24 was not recorded as an adult education activity.

The overall increase in participation in adult education between 1991 and 1999 was widespread, occurring among virtually every group of adults examined in this report. Specifically, participation rates increased among the following: all age groups except those ages 35-44; both men and women; all racial/ethnic groups; all education levels; all labor force groups; and all occupation groups except those in professional or managerial positions.

Many participation patterns were the same in 1991 and 1999. In both years, adults with higher levels of education participated at higher rates than adults with lower levels of education; retired adults participated at a lower rate than those in all other labor force groups; and those in higher status occupations participated at higher rates than those in lower status occupations.

Changes in participation that did occur over time generally ameliorated differences among groups of adults. In 1991, younger and older adults participated at a

lower rate than mid-aged adults, but in 1999 only older adults participated at a lower rate than those in other age groups. In 1991, non-Hispanic Blacks participated at a lower rate than non-Hispanic Whites, but in 1999, all minority groups participated at the same rate as non-Hispanic Whites. In 1991, full-time workers participated at a higher rate than all other adults, but in 1999, part-time and unemployed workers participated at the same rate as full-time workers; only those not in the labor force participated at a lower rate than full-time workers. In 1991, there was no difference in participation rates by sex, but in 1999, women participated at a higher rate than men. Over the shorter time period between 1995 and 1999, participation rates increased overall and for all types of adult education except ESL programs and work-related courses.

Learning Goals for Participation in Lifelong Learning For Older Adults

Hiemstra (1976) used trained interviewers to gather data from 256 people, over 55 years of age, to examine the instrumental (“basic or skill mastery areas”) versus expressive learning (“enjoyment or self-fulfillment education”) activities of older adults (Hiemstra, 1982, p.143). These individuals were randomly selected from voter registration cards in two rural Nebraskan communities. The instrument, a list of 32 courses, was tested for construct and concurrent validity. Participants were asked to indicate which courses they would prefer to follow, if given the opportunity. The results were divided into two groups and compared using chi-square. Hiemstra discovered a significant preference for instrumental learning in actual learning projects and courses and concluded that educational administrators should provide more instrumental learning opportunities for the adult participant.

Opposite results were found by O'Connor (1987) who also studied the learning goals of older adults, over 60 years of age, and discovered a preference for expressive learning. In this exploratory study, O'Connor surveyed 250 adults, divided into three cohorts: mature adults (over 60 years) attending college, middle aged adults (40 - 59 years) also attending college, and Elderhostel participants 60 years of age and older. O'Connor concluded that the distinction between expressive and instrumental goals were relevant to the respondents and that the goals of the middle-aged were more instrumental, while with older adults the goals were more expressive.

Two years later Wirtz and Chamer (1989) surveyed 490 seniors, who had participated in educational courses since their retirement, and found that two thirds of their sample population reported both instrumental and expressive needs. However, Wirtz and Chamer concluded that they did agree with O'Connor, that as concepts both expressive and instrumental orientations were important.

Older Adults and Technology Use

In July 2013, the Pew Research Center's Internet and American Life Project and the Gates Foundation conducted telephone interviews to research how older adults how use technology. Telephone interviews were conducted with a nationally representative sample of 6,224 people living in the United States, ages 16 and older; 3,122 were interviewed by landline and 3,102 by cell phone (of those 1,588 were without a landline phone). Princeton Survey Research Associates International conducted the survey. The interviews were administered in English and Spanish by Princeton Data Source from July 18 to September 30, 2013.

This survey revealed that among older adults, there was a link between frequent social interaction and the use of the Internet. The survey reported 46% of seniors who went online used social media networking sites such as Facebook; these social media network adopters had more persistent social connections with the people they cared about. Some 81% of older adults who used social media networking sites said that they socialized with others (either in person, online, or over the telephone) on a daily or near-daily basis. Among older adults who used the internet, but did not use social media networking sites, 71% reported having social interactions on daily basis. For those who did not go online at all, 63% reported socializing on a daily basis. Therefore, older adults who used social media networking sites were more socially engaged than those who did not use social media networking sites and who did not use the internet.

Elderhostel

Elderhostel was founded in 1975 and it was a non-profit organization for elders who are over 55 years old. The emerging of elder learning was started in France in the University of Toulouse and moved to the Universities of the Third Age in the United Kingdom. "The first Institute for Retired Professionals (IRP) was started at The New School for Social Research in New York in 1962 by a group of retired teachers" (Lamdin & Fugate, 1997, p. 107).

The subject areas are in the arts and humanities, community and intercultural issues, current events, local history, interdisciplinary studies, and foreign affairs. Courses were delivered via lecture, learning projects and travel learning experiences. They offered a mix of practical and theoretical studies, and there are almost always special lecture series, social events, and sponsored expeditions to nearby museums, galleries, historical sites, and theatrical and musical performances. (Lamdin & Fugate, 1997, p. 109)

The Elderhostel Institute Network (re-named as Road Scholar Institute Network, 2009) was a means to cooperate. This organization published newsletters and held workshops for leaders all over the United States and was founded by Marty Knowlton with headquarters in Boston, Massachusetts during the time in which Elderhostel was an educational program for elders. All of the courses were non-credit and contained no exams, grades, or required assignments. Based on the Lifelong Learning Institute (LLI) movement across college and university campuses, the Elderhostel institutes offered a variety of one to three week residential, educational programs for elders (The Road Scholar website, 2015). By the year 2015, there were over 1500 institutions throughout the United States, over 10 provinces in Canada, and more than 40 foreign countries that offered Elderhostel (The Road Scholar website, 2015).

Road Scholar: Member Survey 2014

The Road Scholar survey was administered using the website Survey Monkey, and emailed to the approximately 410 Lifelong Learning Institutes (LLIs) who were members of the Road Scholar Institute Network, on October 17, 2013. The survey closed on January 3, 2014 with 172 participants and over a quarter (26.6%) of survey respondents were Osher Lifelong Learning Institute (OLLI) members. Several reminder emails were sent, and in December, 2013 reminder telephone calls were made to non-responding LLI members. In this survey, LLI leaders reported on various aspects of their LLI members – particularly membership, curriculum, and administration.

The participants were between 50 and 90 years old. People in their 70s were the most highly represented age group in LLIs, accounting for 31%-40% of membership. Less than 30% of the members were in their 60s, while only 20% were in their 80s. Less

than 10% of members were either in their 50s or their 90s, and it was very uncommon to find members older than 90 or younger than 50. In relation to membership, 500 LLI members paid a membership fee, a course fee, or made a financial donation. Most LLI members lived 10 miles or fewer from their LLI, while practically none came from more than 25 miles away. Most LLIs (85.3%) offered day trips or excursions to their members, with 38.9% offering six or more of these trips each year. Fewer LLIs offered overnight trips: 31.5% offer overnight bus trips, 24.8% offer international trips, and 15.6% offer North American trips requiring air transportation. This survey did not include gender, race/ethnicity, and level of education. Related to aspect of administration, 167 LLI members responded to questions about their full-time and part-time staffs, volunteer positions, and responsibilities of the executive directors.

SeniorNet Tampa 1993-2000

The mission of SeniorNet 1993-2000 was to provide seniors who were 50 years and older the opportunity to improve their computer skills or to be able to use the internet to enrich their lives and to engage in more social contact sharing their knowledge and wisdom (The SeniorNet website, 2015). This program was originally based on basic computer courses, but in 2010, it began offering more advanced courses that included topics such as genealogy, graphics, digital photography, and financial management (The SeniorNet website, 2015).

SeniorNet Tampa developed Working Seniors: A community outreach program in cooperation with Hillsborough County to provide computer skills necessary to prepare unemployed seniors to re-enter the work force (A. Rogers, personal communication, October 3, 2014). The Aging Services Department of Hillsborough County recognized

SeniorNet Tampa Program for their services with an award “In recognition of outstanding service in providing computer training to older workers.”(SeniorNet annual report, 1999)

Regular courses offered each semester included: Introduction to Computers, Windows 98, Graphics, Family Tree, Quicken, Word Processing, Financial Planning, Exploring the Internet, and Fundamentals of Computers. Waiting lists existed for most semesters for some or all of the classes (Miller, 2000). SeniorNet Tampa volunteers formed a “Users Group” to mutually help one another understand problems with their Personal Computers (PCs). The SeniorNet Users (SNUG— Seniors Networking Users Group) was for students; former students; and volunteer instructors and coaches. This group held monthly events with lectures and speakers from the computer industry. Five meetings a year included formal speakers and the other five meetings contained question and answer sessions so the members could bring ongoing questions addressed as a discussion (A. Rogers, personal communication, October 3, 2014). Subsequently, SeniorNet Tampa changed to OLLI-USF in 2005.

The Learning in Retirement Institute (LIR), 1994-2004

The official life of the Learning in Retirement Institute (LIR) began in January, 1994 with the Informational Coffee on January 27, 1994, sponsored by the University Advancement Office and the Division of Senior Programs at the School of Continuing Education at the University of South Florida (Riddle, 1995). In September, the LIR Institute was approved in “Development Status” by the Elderhostel Institute Network (Rafman, 1997). The first set of study groups, which began the week of March 21, were well along and the Curriculum Committee was recommending a set of four-week

courses to begin in May (Riddle, 1995). In September of 1994, the LIR Institute enrolled for full membership in the Elderhostel Institute Network (Riddle, 1995). .

By May of 1995, the Institute had offered three sets of eight-week and three sets of four-week study groups (Riddle, 1995). Later, the Institute also had an established pattern of study group offerings: eight-week groups in the Fall and Spring, each followed by four-week group. The Foundation decided to help fund a national network of Lifelong Learning Institute (Riddle, 1995).

OLLI-USF

The OLLI-USF started in 1993 with assistance from two national stakeholders in older adult education: Elderhostel and SeniorNet. OLLI-USF emerged in 2005 by combining two institutes: Learning in Retirement (LIR) and SeniorNet Tampa (A. Rogers, personal communication, October 3, 2014). The LIR got an initial support from Elderhostel (Riddle, 2005). The Division of Senior Programs was renamed the Osher Lifelong Learning Institute in 2005. OLLI-USF received two Bernard Osher Foundation grants of \$100,000 in 2005 and 2006 (The OLLI-USF website, 2014). OLLI-USF was under the USF Division of Senior Programs and its constituent programs, SeniorNet and Learning in Retirement as of 2006.

The Osher family were philanthropists who had channeled their generosity into education, medicine, and the arts (The Bernard Osher Foundation website, 2014). They endowed USF \$2,000,000 in funding (A. Rogers, personal communication, October 3, 2014) for successful running the organization. It changed its name to OLLI-USF in the summer of 2005 because each grantee is mandated to carry the name of “The Osher Lifelong Learning Institute at University X” and the use of an “Osher Lifelong Learning

Institute” logo to qualify as a member of the Osher national network (Osher Foundation, 2011). OLLI-USF is one of six Florida OLLIs – others are at Eckerd College, University of Miami, University of North Florida, Florida International University and Florida State University.

The goals for OLLI-USF are: value all members; pursue intellectual stimulation, social interaction, aging successfully; satisfaction of teaching; sharing life experiences, convenience of program costs and easy location; being an agent of change such as fighting with ageism, and structure and purpose in life (The OLLI-USF website, 2014). In March 2008, OLLI-USF reorganization group made a vision statement to make a world-class learning community (A. Rogers, personal communication, October 3, 2014). The vision statement of OLLI-USF was to be inclusive and representative of the broader community.

The organizational chart was developed to support the mission, vision, and value statement. The chart for the reorganization contained each committee’s mission statement and the need for flexibility in committee members term limits. The director of OLLI-USF recognized perception of gaps in OLLI-USF such as volunteer recruitment, volunteer orientation, volunteer recognition, member orientation, member services, succession planning, technology support for Arts and Science classes, and organizational development (A. Rogers, personal communication, October 3, 2014).

Pilot Study Results of OLLI-USF

A pilot study conducted at the OLLI-USF in 2014 indicated that USF had different results compared to national data in online-class taking and technical usage. In relation to education level, 52% of the participants had bachelor degrees and 36% went to

graduate schools. The respondents' marital status was as follows: 62% married, 20% divorced, 14% widowed, and 4% self-identified single. In relation to marriage status, 68% of respondents were currently married. In addition, 14% of the respondents were living with a child under the age of 18. In relation to income level, 38% of the participants' average yearly total household income before taxes was above \$75,000. The majority of the respondents were no longer actively employed. In relation to employment status, 86% of the respondents were retired, with 10% self-identifying as unemployed or as homemakers. The preferred topic subjects were history, art, and computer classes. The biggest benefit of taking OLLI classes was reported to be intellectual stimulation (52%).

Gap Statement

There are three categories of lifelong learning institutes: formal, informal, and non-formal (UNESCO, 1992). OLLI is an example of a formal lifelong learning institute. Formal lifelong learning institutes are based on a structured higher education model that structured, controlled, intentional, and board coverage of topics. Non-formal lifelong learning institutes are well organized, planned, and centered on the participant, but they do not put emphasis on measuring participants' performance learning. Informal lifelong learning institutes, on the other hand, take a place in everyday life, on the job, in the family circle or in leisure time by instruction, observation or doing the activity with others (Tamilina, 2012). Because of the differences in the structure between OLLI and other Lifelong Learning Institutes, they cannot be studied in the same way. A gap in the literature remains between a profile of lifelong learners and a profile of OLLI members.

This is because OLLI only began in 2000, whereas Lifelong Learning Institutes have been in existence since the 1950s.

Learning is the reason most often cited by attendees of a LLI for continued attendance, but the learning at a LLI is different from the learning found in a traditional higher education classroom. While the class content is typically college-level, the courses are taken on a noncredit basis, and “the curricula are chosen, designed, and often led by organization members who encourage peer learning and active member participation” (Kim & Merriam, 2004, p. 442). More studies in lifelong learning may explain why large groups of older people are pursuing lifelong learning, since little is known about specific needs that lead to participation in education (Bynum & Seaman, 1993; Kim & Merriam, 2004; Lamb & Brady, 2005; McClinton 2010; Scala, 1996; Szücs 2001).

OLLI programs have unique features such as a national network across all 50 states. Secondly, OLLI has a conference every 18 months and two people from each organization get full financial support from the OLLI foundation to attend. Conference attendees also help each other work toward the future direction of OLLI (A. Rogers, personal communication, October 3, 2014). Third, OLLI programs are “operated independently at colleges and universities throughout the United States and are not in any manner formally associated with each other” (Brady, Cardale, & Neidy, 2013, p. 628).

The timing of individual retirement in the United States is changing. The evolution of Social Security benefits and its questionable solvency are only two reasons for this change. The recent economic recession has compelled individuals to reconsider their

plans for work and leisure in their retirement years. Financial obligations may require potential retirees to stay in the paid workforce longer than anticipated. Individuals are living healthier lives. With the trend towards increased longevity, retirement savings may need to last decades longer than ever before.

Chapter Summary

In chapter 2, literature related to this research study reviewed the history of Elderhostel, OLLI-USF, SeniorNet Tampa, Learning in Retirement Institute (LIR), and Lifelong learning in America. It also includes motivation factors for older adult participation in lifelong learning, participation trends and patterns in adult education: 1990-1999, learning goals for participation in lifelong learning for older adults, and older adults and technology use. Last, the result of pilot study and Road Scholar survey results (2014) were presented in this chapter. One of the significant findings of this literature review was that there was a gap between OLLI and LLIs based on the structure, annual conference, and independent setting in higher education. Chapter 3 presents methods of this research.

Chapter 3

Methods

The purpose of this research was to identify the profile of OLLI members and compare the differences between non-Florida and Florida institutes. In this research, the issues which were compared included relocation after retirement, usage of technology, and social media network utilization related to current and future OLLI courses (areas of course interest and course delivery methods). A profile of OLLI members and differences in demographics and preferential learning mode (preference of technology use, course delivery, relocation after retirement, and topics) among institutes both at national and state (Florida) levels were explored. This chapter addresses the population and sample used, the instrumentation, the data collection strategy, data analysis strategies, and a summary.

Population and Sample

The entire population of the Osher Lifelong Learning Institutes consisted of 152,922 members in the United States during fiscal years of 2013-2014. Florida OLLI members consisted of 6,887 for the fiscal years 2014 and 2015. This study used a convenience sample (nonprobability sampling) drawn from OLLI members taking classes in Florida. Because the participants were available and willing to participate, convenience sampling was appropriate for this research (Creswell, 2008). Although the individuals in the study were not completely representative of the general population, they provided useful information about the profile of OLLI Florida members.

Sample size. Power analysis was used to determine an adequate number of participants to detect an effect if the effect actually exists. A power analysis identified the appropriate sample size for group comparisons by considering the level of statistical significance (alpha), the amount of power desired, and the expected effect size (Creswell, 2008). The goal of this study was to achieve a sample size of approximately 187 OLLI members to achieve an 80% power level, with a medium effect size (0.30), α (0.05), and a degree of freedom of 11, which is the highest degree of freedom to find a significant relationship in the sample. Sample size was based upon the information provided in the sampling distribution by using G-Power program. Appendix C contains sample size with power and a key of the variables used in the statistical analysis arranged by degree of freedom. In terms of gender, there were two possible answers male or female; the degree of freedom was one. The table was arranged by increasing degree of freedom and effect size: small (0.10), medium (0.30), and large (0.50). Sample size was calculated at 80% of power.

Instrumentation

Demographic and behavioral trends survey. Brady and Hanson (2014) created 14 questions that were developed from discussions and suggestions made by program directors and others in prior research sessions at national and regional conferences. It concentrated on key demographic variables (e.g., age, gender, education) as well as trends discussed in the retirement literature (relocation, employment, and social media network utilization) and related to current and future Osher Lifelong Learning Institute (OLLI) courses (areas of course interest and course delivery methods, technology usage, and relocation after retirement). There were four

open-ended responses that were added in the survey regarding technology use, preferred topic areas, social media network usage, and employment. Appendix B contains the Florida OLLI survey, 2015 which included the four open-ended responses. The survey was administered to more than 3,300 older adults.

Reliability. A test-retest reliability was conducted between December 19, 2014 and January 18, 2015. The study was conducted in the Innovative Education Department at the University of South Florida (USF). Ten OLLI-USF members participated in the survey twice. One of Survey Monkey functions, *collectors*, gave each participant a unique link, then coded them as A1, A2, B1, B2, C1, C2, and so on. Test and retest scores were used to reveal if respondents answered in a similar manner. Cohen's Kappa was used to calculate the agreement between test and retest scores of the participants. The results were 1.00 for demographics, 1.00 for employment, 0.80 to 1.00 for technology use, 0.60 to 1.00 for preferred topic areas, 0.80 to 1.00 for social media network usage, 0.80 to 1.00 for course delivery method, and 0.80 to 1.00 for relocation after retirement variables. Based on Landis and Koch (1977), analyses of test-retest reliability indicated moderate agreement (0.60) to almost perfect agreement (1.00) across all questions. Appendix D contains the results of reliability testing including each answer option.

Content validity. Content validity was defined as the "extent to which inferences from a test's scores accurately reflect the concept or conceptual domain that a test is claimed to measure" (Gall, Gall & Borg, 2003, p. 621). Content validity was achieved through the use of panels of experts who define and create all aspects of the instrument in the development phase. There was evidence for content validity based on the review

of the OLLI Research Review Panel (J. Hansen, personal communication, October 31, 2014). The Brady and Hanson (2014) validation panel consisted of seven individuals with expertise in lifelong learning related to older adults. This group reviewed the questions individually, provided suggestions for improvement/clarification, and then discussed the final version as a group via teleconference.

Data Collection

The national data were available through the OLLI National Research Center website. The Florida data collection was conducted using a web-based survey tool (SurveyMonkey). This survey was selected as a low-cost tool to reach a large number of OLLI members in Florida. The SurveyMonkey account was provided by OLLI-USF. Four universities participated in the study— University of North Florida (UNF), University of South Florida (USF), Eckerd College, and the University of Miami (UM). Florida directors from each of these universities sent an email, including a request for participation and an Institutional Review Board (IRB) approval letter, to their OLLI members to recruit them for participation in the study. Appendix E contains the IRB approval letter for this research.

Four separate survey links were created—one for each participation OLLI organization through the OLLI-USF SurveyMonkey account and the corresponding link was sent to each OLLI program director via SurveyMonkey. The survey questions were the same for each institution. The data were collected automatically when the OLLI members finished the survey. Potential participants were contacted via e-mail from the director of each organization and were given a specific time period (2 weeks) to respond. The Florida directors sent a reminder email to their OLLI members if they had

not responded by a determined date. Appendix F contains the email reminder for this research.

Participation was anonymous, voluntary, and uncompensated. To increase the response rate, the researcher planned to ask the Florida directors to use two different emails with different amounts of details regarding the study. According to Dillman, Smyth, & Christian (2014), survey respondents might be reluctant to respond if a researcher continuously asked them to participate in the study. He also implied if the researcher sent the same survey multiple times, then the participants might assume that it was a different study. Therefore, it was important that the participants knew the second notice of the survey was from the same researcher, thus maximizing the chances of compelling people to reply. One email provided an explanation of the survey and the other was a short version of the first email.

In phase one, all Florida OLLI directors were contacted by sending an email to explain the study and shared results of the pilot study of OLLI-USF, which was conducted during Summer 2014. Appendix G contains the email which sent to the Florida directors to explain the research and included results of the pilot study of OLLI-USF for this research. This provided the directors an idea about the survey and helped them to decide if they would participate in this survey. In phase two, the researcher sent an email, which included the survey link and IRB approval letter (see Appendix E), to the Florida OLLI directors who agreed to participate. In phase three, which occurred four days later, the researcher contacted all of the directors to go through the survey with them to determine if any problems existed during the administration of the survey. Two weeks later, in phase four, the researcher sent the first reminder to the Florida

OLLI directors. In phase five, a week later, the second reminder was sent to the Florida OLLI directors.

Data Analysis

Once completed, the data were retrieved from SurveyMonkey and were exported to Excel; Statistical Analysis System (SAS) was used to analyze the data. This study had three research questions:

1. What is the Florida profile of Osher Lifelong Learning Institute (OLLI) members?
2. How do national profiles of OLLI members compare to Florida profiles in terms of demographics (age, gender, married status, educational level, and employment)?
3. How do national profiles of OLLI members compare to Florida profiles in terms of reported preferential learning modes (preference of technology use, course delivery, relocation after retirement, and topics)?

Data were analyzed using frequencies and the Chi-square Goodness-of-fit test. Data analyses were conducted to answer each research question, and descriptive statistics were calculated to report the socio-demographics of the sample. Percentages were used to describe participants' demographics information. If the result of Chi-square Goodness-of-fit test was statistically significant (i.e., p -value of the test less than .05), there was evidence of a difference between the national and the Florida OLLI members. The effect size was calculated to see if the difference was small (0.1), medium (0.3), or large (0.5) (according to Cohen, 1992). All research questions were analyzed using frequencies and percentage. Four questions (5, 8, 9, and 14) in this survey had open-ended responses. Question five asked about employment status and the last answer for all these questions was "other (please specify)" in Appendix B. The four open-ended

responses were analyzed by frequencies and recorded in a table for the variables: employment status (question 5), usage of technology (question 8), social media network (question 9) and subject areas (question 14). A Chi-square Goodness-of-fit test was utilized for categorical variables, for the purpose of highlighting similarities and differences.

Goodness-of-fit test. This statistical technique was used because the purpose of the study was to compare the Florida profiles to the known national profiles and the variables used were categorical. Each categorical variable was compared between national and Florida samples in order to see how well the observed data fit the hypothetical distribution of the data. Chi-square Goodness-of-fit test was used to compare the observations of a single categorical variable with theoretical values. In all analyses, *p*-value of .05 was used to determine statistical significance for Chi-square values.

Summary

This chapter outlined the research design of the present study in comparing between national and state profile of the effects of a later-life learning program on a group of older adults aged 55 and above who were attending OLLI. The quantitative study was conducted with a national group in spring, 2014. The comparison group, Florida OLLI, used the same instrument, but it added four additional open-ended questions. Chapter 4 will present of findings of this study.

Chapter 4

Findings

The purpose of this research was to identify the profile of OLLI members and compare the differences between non-Florida and Florida institutes. The issues which were compared included relocation after retirement, usage of technology, and social media network utilization related to current and future OLLI courses (areas of course interest and course delivery methods). This chapter presents the results of the data analysis used to describe the sample and to answer the research questions and includes a section on the demographic characteristics of the sample, and the chapter summary.

Demographic Characteristics of the Sample

Research question 1. What is the Florida profile of OLLI members on the demographic characteristics (gender, age, marital status, educational level and employment status) of older adults in Florida?

A total of 1,178 Florida OLLI members completed the survey in 2015. The participants were from Eckerd College, University of North Florida, University of South Florida, and University of Miami. As shown in Table 1, survey respondents were predominantly female ($n = 805$, 69.46%). There were 354 (30.54%) males who participated in at least one Florida OLLI course. The largest age group was between 70 and 74 years old ($n = 308$, 27%), and the smallest group was under 50 years ($n = 1$). The majority of Florida OLLI members were between the ages of 65 and 74 years old (n

= 579, 50.39%), and most of them were married ($n = 703$, 61.45%). The second largest marital status group was single, with 252 members (22.03%). The third largest marital status group was widowers ($n = 189$, 16.52%).

In terms of educational level, the majority of survey respondents had completed graduate school ($n = 573$, 50.26%). Otherwise, Florida OLLI members completed some graduate school ($n = 141$, 12.37%), attended college ($n = 388$, 33.78%), and completed high school ($n = 38$, 3.34%). In terms of employment status, Florida OLLI members were fully retired ($n = 959$, 86.87%), or were working part-time ($n = 119$, 10.78%). Otherwise, there were a few Florida members who were unemployed and looking for a job ($n = 5$, 0.45%). (See Table 1 for the demographic distribution.)

There were 61 comments on the open-ended question for the employment status. Table 2 contains Florida OLLI members' open-ended question comments on employment status. A sample of responses included the following: "work as consultant" ($n = 30$), "self-employed" ($n = 5$), "housewife" ($n = 5$), "volunteer" ($n = 4$), "mother" ($n = 3$), "writer" ($n = 2$), and "occasional work" ($n = 2$), "semi-retired," "out of work on disability," "a care giver for 90-year old mother," a "worker on projects for non-profits," "never work." Others included comments such as, "I am a writer and we never retire", "Not fully retired, but rarely accept on-call work," "Now do homemakers really ever retire?", and "Only occasional legal and real estate brokerage practice."

Table 1

Florida OLLI Membership: Composite Demographic Distribution

Variables	<i>p</i> value	Effect size	National <i>n</i>	Florida <i>n</i>	National %	Florida %
Gender						
Male			890	354	29.77	30.54
Female	0.6863	0.02	2100	805	70.23	69.46
Age						
Under 55 years old			69	11	1.30	0.96
55-59			138	31	4.57	2.70
60-64			407	97	13.54	8.44
65-69			858	271	28.80	23.59
70-74			746	308	24.82	26.81
75-79			441	230	14.68	20.02
80-84			236	112	7.92	9.75
85 years old and up	0.0001*	0.36	98	89	4.30	7.75
Marital status						
Married			1856	703	62.18	61.45
Single			596	252	19.97	22.03
Widow	0.1709	0.06	533	189	17.86	16.52
Educational level						
Some high school			2	2	0.07	0.18
High School			55	36	1.75	3.16
Some college			313	125	10.47	10.96
College/undergraduate			698	263	23.31	23.07
Some graduate school			393	141	13.20	12.37
Graduate school	0.0074*	0.12	1530	573	51.20	50.26
Employment status						
Fully retired			2474	959	80.22	86.87
Part time			446	119	14.46	10.78
Full time			130	21	4.22	1.90
Seeking job	0.0001*	0.18	34	5	1.10	0.45
Years after retirement						
1-2 years			419	181	15.35	16.68
3-5 years			544	211	19.93	19.45
More than 5 years			1686	663	61.78	61.11
I did not work outside home	0.6681*	0.04	80	30	2.93	2.76

Note. *statistically significant at $p < .05$

Comparisons Between Florida and Non-Florida OLLI Members

Research question 2. How do non-Florida profiles of OLLI members compare to Florida profiles in terms of demographics (gender, age, marital status, educational level, and employment)?

Both National and Florida OLLI members had a bell-shaped curve of a normal distribution for age. Appendix H (Figure 1) contains a visual representation of the age distribution for both national and Florida OLLI participants. On average, Florida OLLI members were older than national OLLI members. The largest age group for national OLLI members was from 65 to 69 years old ($n = 858$, 28.80%), while the largest age group for Florida OLLI members was 70 to 74 years old ($n = 308$, 26.81%) who fall into the Baby Boomers generation (born 1946-1964). For both national and Florida OLLIs, there was a rapid drop-off in numbers of participants between 65-69 and 60-64 years old respectively.

A Chi-square test of goodness-of-fit was performed to identify differences in age groups between the two OLLI programs. The range of age groups for the two programs was not equally distributed in the population, $\chi^2 (7, N = 1138) = 144.6842, p < .05$ with medium effect size (Table 1 contains p values and effect sizes for comparison between national and Florida OLLIs variables). There was a statistically significant difference between the national and Florida sample regarding age groups, indicating that there was a difference in the ages of those who sought courses at OLLI organizations in this sample.

In terms of gender, national OLLI members were 70.23% female and Florida OLLIs were 69.46% female. A Chi-square test of goodness-of-fit was performed to

identify gender differences between the two OLLI programs. Gender for the two programs was equally distributed in the population, $\chi^2 (1, N = 1159) = 0.1631, p > .05$ with a small effect size (see Table 1). Therefore, there was no statistically significant difference between the national and Florida sample in terms of gender indicating that statistically the same percentages of men and women made up the national population as the Florida population.

National and Florida survey respondents' marital statuses were very similar (See Table 1). Married participants in both OLLIs accounted for approximately 62% of the participants; however, Florida single status appeared somewhat higher than the national data. A Chi square test of goodness-of-fit was performed to determine difference in marital status between the two OLLI programs. Marital status was equally distributed in the population, $\chi^2 (2, N = 1144) = 3.5335, p > .05$ with a small effect size (see Table 1). Therefore, there was no statistically significant difference between the national and Florida sample in terms of marital status, indicating that the marital statuses of the national population and the Florida population were statistically similar.

Florida OLLI participants ranged from high-school graduates (3.16%), to those with some college attendance (10.96%), a bachelor's degree (23.07%), and some graduate school experience (50.26%). In both national and Florida OLLIs, 33% of the participants attended college. Education level was very high in both populations, with approximately 50% of national and Florida OLLI members having completed a graduate program. A Chi-square test of goodness-of-fit was performed to identify differences in educational level between the two OLLI programs. The educational levels were not equally distributed between the two programs, $\chi^2 (5, N = 1140) = 15.8104, p < .05$ with

small effect size (see Table 1). There was a statistically significant difference between the national and Florida samples in educational levels. Florida OLLI members ($n = 36$, 3.16%) had a higher number of high-school graduates compared to national OLLI members ($n = 55$, 1.75%).

In terms of employment status, Florida OLLI members had a 7% higher number of people who were fully retired than those in the national programs (see Table 1). Moreover, 446 (14.46%) of national OLLI members who worked part-time was 4% higher than those in Florida. More national OLLI members ($n = 130$, 4.22%) had a full-time job than Florida OLLI members ($n = 21$, 1.90%). The rates of those seeking a job was very low overall, but more national OLLI members ($n = 34$, 1.10%) than Florida members ($n = 5$, 0.45%) were seeking employment.

A Chi-square test of goodness-of-fit was performed to identify differences in employment status between the two OLLI programs. Employment status for the two programs was not equally distributed in the population, $\chi^2 (3, N = 1104) = 34.6809$, $p < .05$ with a small effect size (see Table 1). There was a statistically significant difference between national OLLIs and Florida OLLIs in terms of employment status indicating that the national population had a higher employment rate than the Florida demographic did.

A follow-up question was asked regarding the number of years from retirement to relocation. Choices on the survey included “1-2 years before I left full-time work,” “3-5 years,” “more than 5 years,” and “because of family/home responsibilities, “I did not work outside the home.” The most frequent answer, “more than 5 years before I left full-time work,” was 42.46% at the Florida level. Florida OLLI members ($n = 181$) identified they moved to Florida 1-2 years after their retirement. A Chi-square test of goodness-of-

fit was performed to identify differences in years from retirement between the two OLLI programs. The number of years from retirement was equally distributed in the population, $\chi^2(3, N = 1085) = 1.5618, p > .05$ with a small effect size (see Table 1).

There was no statistical significance between the national and Florida samples in years from retirement to relocation.

Reported Preferential Learning Modes

Research question 3. How do non-Florida profiles of OLLI members compare to Florida profiles in terms of reported preferential learning modes (preference of technology use, course delivery, relocation after retirement, and topics)?

Preference of technology. The respondents were asked what kind of technical devices they possessed (such as laptop, iPad, or smart phone). Approximately 50% of all OLLI members used a laptop or desktop computer in both the national and Florida samples. Table 2 contains national and Florida data of technology preference and course delivery mode. Among the four Florida OLLIs (Eckerd College, University of North Florida, University of South Florida, and University of Miami), there was a wide range of variation regarding usage of laptop or desktop computers.

Respondents were asked about their use of iPads or other notebook devices with similar results (national: 22.35% and Florida: 21.98%). The open-ended questions related to technology usage and were organized into seven general areas: (a) “digital camcorder and cameras” ($n = 9$); (b) “e-reader” ($n = 8$); (c) car technology such as “GPS” ($n = 7$); (d) “printer or scanner” ($n = 6$); (e) office technology such as “organizer, graphing calculator, and typewriter” ($n = 5$); (f) “music devices” ($n = 2$); (g) medical device such as a “blood pressure monitor” ($n = 2$). Respondents indicated that they

utilized the following devices as well: “PowerPoint,” “computerized sewing/embroidery machine,” “laptop facilitated by my daughter,” and “Apple watch and TV.” Appendix I contains a list of other comments regarding technology use.

A Chi-square test of goodness-of-fit was performed to determine whether a technology usage preference existed in the two OLLI programs. Laptop or desktop computer usage preference for the two programs was equally distributed in the population, $\chi^2 (1, N = 1178) = 0.0954, p > .05$ with a small effect size (see Table 2). There was no statistically significant difference between the national and Florida samples in laptop or desktop computer usage preference, indicating that the national and Florida populations had similar preferences regarding the usage of laptop and desktop computers.

A Chi-square test of goodness-of-fit was performed to determine whether a technology usage preference existed in the two OLLI programs regarding iPad or other notebook devices for the two programs. This test was equally distributed in the population, $\chi^2 (1, N = 1178) = 0.0897, p > .05$ with a small effect size (see Table 2). There was no statistically significant difference between the national and Florida samples in iPad or other notebook device usage preference, indicating that there was no difference between the usage of iPads or other notebooks devices between the national and Florida samples.

A Chi-square test of goodness-of-fit was performed to determine whether a technology usage preference existed in the two OLLI programs in regard to smart phone usage preference for the two programs. This test was not equally distributed in the population, $\chi^2 (1, N = 1178) = 396.4764, p < .05$ with a high effect size (see Table

2). There was statistically significant difference between the national and Florida samples in smart phone usage preference, with the Florida population using smart phone (iPhone, Android, Blackberry, etc.) more than the national population.

Table 2

National and Florida Data of Technology Preference and Course Delivery Mode

Variables	<i>p</i> value	Effect size	National %	Florida %
Technology preference				
Laptop or desktop computer	0.7574	0.01	50.45	49.56
iPad or other notebook device	0.7645	0.01	22.35	21.98
Smart phone (iPhone, Android, Blackberry, etc.)	0.0001*	0.58	24.34	26.30
Other			2.86	2.16
Social media networking				
Facebook	0.0074*	0.09	60.43	55.85
LinkedIn	0.0668	0.06	18.33	15.85
Instagram, YouTube, or other photo or video sharing site	0.1854	0.05	14.43	12.80
Other			6.81	15.49
Course delivery mode				
MOOC participation				
Yes			18.96	14.01
No	0.0576	0.06	81.04	70.37
100% online				
Yes			0.74	0
No	0.0098*	0.08	99.26	100
Blended class				
Yes			21.52	3.22
No	0.0001*	0.46	78.48	96.78

Note. *statistically significant at $p < .05$

Social media network preference. Respondents were asked which social media networking sites they used such as Facebook and LinkedIn. National social media networking usage in the population was higher than Florida in terms of social media networking. According to the data received, OLLI members used Facebook

(national, 60.43%, Florida 55.85%), while less than half used LinkedIn (national, 18.33%, Florida 15.85%), and Instagram (national, 14.43%, Florida 12.80%). The top five comments in response to the open-ended question regarding the participant use of social media networking were: (a) None of above ($n = 69$); (b) Twitter ($n = 35$); (c) Google groups ($n = 9$); (d) Skype ($n = 5$); (e) Pinterest ($n = 5$). Others included comments such as “I have accounts in all but don't use them regularly,” “Dropbox,” and “YouTube.” Appendix J contains a lists of other comments of preference of social media networking.

Facebook. A Chi-square test of goodness-of-fit was performed to determine whether a preference of social media networking sites existed in the two OLLI programs. Facebook for the two programs was not equally distributed in the population, $\chi^2 (1, N = 820) = 7.1818, p < .05$ with small effect size (see Table 2). Therefore, there was a statistically significant difference between the national and Florida samples in Facebook with a high effect size. Therefore, Facebook preferences differed between national and Florida OLLI members, with the national population using Facebook more than the Florida population.

LinkedIn, Instagram, Youtube, or other photo or video sharing site. LinkedIn for the two programs was equally distributed in the population, $\chi^2 (1, N = 820) = 3.3590, p > .05$ with a small effect size (see Table 2). Therefore, there was no statistically significant difference between the national and Florida samples in LinkedIn with a high effect size.

Instagram, YouTube, or other photo or video sharing site for the two programs was equally distributed in the population, $\chi^2 (1, N = 820) = 1.7539, p > .05$ with a small

effect size (see Table 2). Therefore, there was no statistically significant difference between the national and Florida samples in Instagram, YouTube, or other photo or video sharing site, with a high effect size, indicating that there was no difference in the usage of Instagram, YouTube, or other photo or video sharing sites for the national or Florida population.

Course delivery mode. Respondents were asked about their experience in blended, 100% online, or MOOC courses. Course participation in fully online courses was only 17 individuals (0.74%) for national OLLI members compared to Florida OLLI members who never attended a 100% online course. The number of Florida OLLI members ($n = 32$, 3.22%) who participated in blended classes was lower than for the participation of the national OLLI members ($n = 495$, 21.52%).

Otherwise, 21.52% of national OLLI members were in a blended class (which is a combination of face-to-face and online modes) while only 3.22% of Florida members had an experience of blended classes. Table 4 contains the most popular topic areas for OLLI courses.

Results related to involvement with online learning external to a Massive Open Online Course (MOOC) included national rates of 18% and Florida rates at 14%. A Chi-square test of goodness-of-fit was performed to determine which of the two OLLI programs experienced a higher rate of enrollment in MOOC. The MOOC experience for the two programs was equally distributed in the population, $\chi^2(1, N = 994) = 3.6043$, $p > .05$ with a small effect size (see Table 2). Therefore, there was no statistically significant difference between the national and Florida samples in experiencing an online class (MOOC).

A Chi-square test of goodness-of-fit was performed to determine which of the two OLLI programs experienced a higher rate of enrollment in a blended class. Blended class experience for the two programs was not equally distributed in the population, $\chi^2(1, N = 1149) = 238.7947, p < .05$ with high effect size (see Table 2). Therefore, there was a statistically significant difference between the national and Florida samples in experiencing a blended class. A Chi-square test of goodness-of-fit was performed to determine which of the two OLLI programs experienced a higher rate of enrollment in a 100% online class. The 100% online class experience for the two programs was not equally distributed in the population, $\chi^2(1, N = 1149) = 273.2334, p < .05$ with a small effect size (see Table 2). Therefore, there was a statistically significant difference between the national and Florida sample in class modality (100% online class) with a small effect size (see Table 2), which indicated that the National population sought out 100% online classes more than the Florida population.

Relocation after retirement. Regarding relocation after retirement, the respondents were asked about whether lifelong learning institutes were the main factor for moving. Relocation for or in retirement was another topic of significant discussion and speculation in the current retirement literature. Respondents were asked about whether or not a “university-based lifelong learning program influenced their decision about where to live after leaving full-time work.” Most of all, 74% of national and Florida OLLI members answered that it was not a factor in their decision.

A Chi-square test of goodness-of-fit was performed to determine which of the two OLLI programs was a better fit when including relocation factors. Relocation factors for the two programs was not equally distributed in the population, $\chi^2(2, N = 1117) =$

6.3179, $p > .05$ with a small effect size (see Table 3). There was a statistically significant difference between the national and Florida samples in the relocation after retirement factor, which indicated that the national population took longer to take OLLI classes than Florida population.

Table 3

National and Florida Data of Preference for Relocation after Retirement

Variables <i>p</i> value and effect size	National %	Florida %
Relocation after retirement		
Grew up in this community	15.70	15.55
More than 5 years before I left full-time work	46.13	42.46
Five years before to 4 years after I left full-time work	17.31	15.26
More than 5 years after I left full-time work	21.04	26.73
<i>p</i> value		0.6681
Effect size		0.04
<i>Major factor for relocation after retirement</i>		
<i>Major factor in my decision</i>	6.48	7.79
<i>Only one of many factors</i>	19.46	17.10
Not a factor in my decision	74.06	75.11
<i>p</i> value*		0.0425
Effect size		0.08

Note. *statistically significant at $p < .05$

Subject preference. The final question on the survey asked people to note their top three curriculum preferences (see table 4). The five most popular topics were: (a) history (national: 20.06%, Florida: 18.12%), (b) fine arts (national: 16.31%, Florida: 14.15%), (c) current affairs (national: 12.25%, Florida: 13.37%), (d) literature (national: 12%, Florida: 9.03%), and (e) religion/philosophy (national: 9.04%, Florida: 7.34%).

A Chi-square test of goodness-of-fit was performed to determine which subject areas were the most appealing in the two OLLI programs. Fine Arts for the two programs was not equally distributed in the population, $\chi^2 (1, N = 1178) = 423.2232, p < .05$ with medium effect size (see Table 4). There was a statistically significant difference between the national and Florida samples in Fine Arts, indicating that the national population sought out courses in the Fine arts more than did the Florida population.

Literature for the two programs was not equally distributed in the population, $\chi^2 (1, N = 1178) = 175.2261, p < .05$ with a small effect size (see Table 4). There was a statistically significant difference between the national and Florida samples in Literature, indicating that the national population sought out courses in literature than the Florida population did.

Foreign languages for the two programs was not equally distributed in the population, $\chi^2 (1, N = 1178) = 730.2349, p < .05$ with a high effect size (see Table 4). There was a statistically significant difference between the national and Florida samples in foreign languages, indicating that the Florida population sought out courses in literature than the national population did

History for the two programs was not equally distributed in the population, $\chi^2 (1, N = 1178) = 625.3188, p < .05$ with a high effect size (see Table 4). There was a statistically significant difference between the national and Florida samples in History, indicating that the national population sought out courses in literature than the Florida population did.

Current affairs/public policy for the two programs was not equally distributed in the population, $\chi^2 (1, N = 1178) = 635.5868, p < .05$ with high effect size (See Table 4). There was a statistically significant difference between the national and Florida samples in current affairs/public policy, indicating that the Florida population sought out courses in literature than the national population did.

Business, finance, and economics for the two programs was not equally distributed in the population, $\chi^2 (1, N = 1178) = 378.5994, p < .05$ with medium effect size (see Table 4). There was a statistically significant difference between the national and Florida samples in business, finance, and economics, indicating that the Florida population sought out courses in literature than the national population did.

Science and mathematics for the two programs was not equally distributed in the population, $\chi^2 (1, N = 1178) = 244.8220, p < .05$ with a small effect size (See Table 4). There was a statistically significant difference between the national and Florida samples in science and mathematics, indicating that the Florida population sought out courses in literature than the national population did.

Technology and computing for the two programs was not equally distributed in the population, $\chi^2 (1, N = 1178) = 996.5856, p < .05$ with a high effect size (see Table 4). There was a statistically significant difference between the national and Florida samples in technology and computing, indicating that the Florida population sought out courses in literature than the national population did.

Photography for the two programs was not equally distributed in the population, $\chi^2 (1, N = 1178) = 200.8008, p < .05$ with small effect size (see Table 4). There was a statistically significant difference between the national and Florida samples in

photography, indicating that the Florida population sought out courses in literature than the national population did.

Crafts for the two programs was equally distributed in the population, $\chi^2 (1, N = 1178) = 0.4723, p > .05$ with a small effect size (see Table 4). There was no statistically significant difference between the national and Florida samples in Crafts, indicating that there was no difference in the choice of craft courses between the national and Florida population.

Health and wellness for the two programs was not equally distributed in the population, $\chi^2 (1, N = 1178) = 114.1583, p < .05$ with a small effect size (See Table 4). There was a statistically significant difference between the national and Florida samples in health and wellness, indicating that the national population sought out courses in literature than the Florida population did.

Religion, philosophy, and spirituality for the two programs was not equally distributed in the population, $\chi^2 (1, N = 1178) = 170.4910, p < .05$ with a small effect size (See Table 4). There was a statistically significant difference between the national and Florida samples in religion, philosophy, and spirituality, indicating that the national population sought out courses in literature than the Florida population did.

Florida data for subject preference yielded greater information than any other open-ended question on the survey: (a) "writing" ($n = 20$); (b) "psychology" ($n = 7$); (c) "bridge" ($n = 5$); (d) "music" ($n = 3$); (e) "film" ($n = 2$); (f) "foreign language courses" ($n = 2$); (g) "game" ($n = 2$); (h) "workshop" ($n = 2$); (i) "improvisation" ($n = 2$). Others included comments such as, "I look for courses on topics about which I know nothing," "I find your courses 'too heady'. Not sure if it is because of your instructors or not. There

needs to be a wider range of topics for us less academic people;” and “third age vacation.” Appendix K contains a list of other comments on preference of subject areas.

Table 4

Most Popular Topic Areas for OLLI Courses

Subject areas	<i>p</i> value	Effect size	National		Florida	
			<i>n</i>	%	<i>n</i>	%
Fine Arts	0.0001*	0.36	1590	16.31	453	14.15
Literature	0.0001*	0.15	1170	12.00	289	9.03
Foreign Languages	0.0001*	0.62	231	2.37	169	5.28
History	0.0001*	0.53	1956	20.06	580	18.12
Current affairs/public policy	0.0001*	0.54	1194	12.25	428	13.37
Business, finance, economics	0.0001*	0.32	318	3.26	157	4.90
Science and mathematics	0.0001*	0.21	584	5.99	198	6.19
Technology and computing	0.0001*	0.85	415	4.26	269	8.40
Photography	0.0001*	0.17	323	3.31	126	3.94
Crafts	0.4919	0.02	274	2.81	37	1.16
Health and wellness	0.0001*	0.01	737	7.56	186	5.81
Religion, philosophy, spirituality	0.0001*	0.14	881	9.04	235	7.34
Other			77	0.79	74	2.31

Note. *statistically significant at $p < .05$

Table 5

Subjects ranking of national and Florida

Ranking	National	Florida
1	History	History
2	Fine Arts	Fine Arts
3	Current affairs/public policy	Current affairs/public policy
4	Literature	Literature
5	Religion, philosophy, spirituality	Technology and computing
6	Health and wellness	Religion, philosophy, spirituality
7	Science and mathematics	Science and mathematics
8	Technology and computing	Health and wellness
9	Photography	Foreign Languages
10	Business, finance, economics	Business, finance, economics
11	Crafts	Photography
12	Foreign Languages	Crafts

Summary

The profile of Florida Osher Lifelong Learning Institute (OLLI) members was 69% female, and the largest age group was from 70 to 74 years old. Other demographic variables included that 61% were married, 50% completed graduate school, and 86% of the members were fully retired. Thus, the findings indicated that there were significant differences between national and Florida OLLI members on demographic characteristics except for gender and marital status.

The other features which reported preferential learning mode (smart phone use, Facebook, subject areas, class modality and relocation after retirement) showed statistically significant difference with respect to magnitude except for technology usage (laptop, desktop, iPad or other notebook device), Instagram, YouTube, or other photo or video sharing site, crafts subject area, and MOOC participation.

Chapter 5

Summary, Discussion, Conclusions, Implications, and Recommendations

The purpose of this research was to identify the profile of OLLI members and compare the differences between non-Florida and Florida institutes. The issues which were compared included relocation after retirement, usage of technology, and social media network utilization related to current and future OLLI courses (areas of course interest and course delivery methods). This chapter includes the following sections: summary, discussion, conclusions, implications, and recommendations for further research.

Summary

Florida is among the top 10 states for older adult population in the United States (Lakin et al., 2007). Although there was a national OLLI profile, there were no existing Florida OLLI member profiles that could be used in this research. In order to compare data between the national OLLI profile and the Florida profile, a survey was conducted to measure demographic factors (age, gender, marital status, educational level, and employment status) as well as relocation after retirement, employment status, usage of technology, and social media network utilization related to current and future OLLI courses (areas of course interest and course delivery methods). Florida directors sent an email to their OLLI members in order to recruit them for participation in the study. A pdf document and an Excel spreadsheet documenting the results was provided by SurveyMonkey. The individual responses were entered in a spreadsheet, and then

relevant statistical methods produced the reported results. Comparison analyses between the national and Florida OLLI member characteristics were included.

Discussion

Nations facing the problem of an aging population include Japan, Italy, Sweden, Spain, Taiwan, Germany, France, United Kingdom, Canada, and Australia (GOJ, 2003). Different nations have attempted various methods of addressing the issue of a rapidly aging adult population. For example, Germany has developed a program around the concept of multi-generation house, which is supported by the government in order to help older adults who feel lonely and young people who need supports to raise their children. The program is built on the idea that different generations live under one roof, which can provide an alternative to the missing traditional extended family model resulting from a changing social structure.

According to the Lifelong Learning Institutes' (LLIs) findings, the majority of the participants were in their 70s, while less than half of Florida OLLI members were within that demographic age range. Comparisons between LLI members and Florida OLLI members showed that Florida OLLI members have a higher average age than LLI members. According to that finding, Florida OLLI members work longer and retire later.

According to *Participation Trends and Patterns in Adult Education* by the Department of Education (Creighton & Hudson, 2002), there was no difference based on gender in the participation rate in 1991. However, by 1999 the percentage of female participants surpassed that of males, which is consistent with this study. DOE (Creighton & Hudson, 2002) also found that in 1991, non-Hispanic whites made up the majority of participants, which is also what this study found. In terms of educational

level, this study found that the majority of participants had a higher educational attainment rate, also similar to the DOE (Creighton & Hudson, 2002) findings.

In terms of technology use, 46% of adults who were above 65 years of age used social media (or social networking applications), according to the Pew Research Center's (2014) study, while 50% of adults older than 55 years of age used social media networking according to this research study. Social media usage among those 65 and older has more than tripled since 2010, when 11% used social media, (Pew Research Center, 2014). It is not a direct comparison because of the different year of research.

The changing demographics of retirees will affect the OLLI program in terms of future subject areas. The baby boomer generation experienced the transition to computerization during their working years. However, findings of this study indicate that technology proficient retirees are more likely to use computers in their third age jobs; therefore, their familiarity with technology is different from previous generations. It is expected that they will want more courses related to technology use in their leisure time. OLLI members are still taking traditional courses such as history and fine arts. However, they also want to improve their technical skills by experimenting with new media such as iPads and other current technologies. Such innovative courses allow members to learn outside of the traditional classroom setting and try new, open-minded learning environments and practices.

Conclusions

In examining the national and Florida OLLI samples, the data indicated that although the gender and marital status distributions of the participants were similar, a majority of the other demographic variables (age, employment status, and educational

level) were different for the Florida and national OLLI samples. For example, Florida participants had a higher than average retirement age than the national sample. One interpretation of this finding is that the Florida sample continued to find satisfaction in their work and the work environment, and may have had occupational and professional goals they wished to accomplish. When viewed from Erickson's (1959) "*ego, integrity vs. despair*" stage of development, it is possible to suggest that the Florida sample may have been successful in continuing to find meaning in their work and accomplishing new goals even during their late retirement age years, which helps in developing integrity rather than despair. The levels of educational achievement between the national sample and Florida are similar; however the Florida sample has a higher completion rate than national for high school graduation.

In addition, the Florida OLLI profile produced different results than the national sample in terms of relocation after retirement, a preference for Facebook and smart phone usage related to subject area preference (except for crafts), and course delivery method (blended courses). These findings could be seen as paralleled with McClusky's (1974) notion that elderly people are active, intelligent, involved people, who have positive feeling about themselves. McClusky's (1974) research findings match this study's findings that older adult learners seek information which will enhance their 'need to survive' and help them maintain a high quality of life, rather than courses designed for leisure time enjoyment. For this reason, OLLI administrators should focus their curricula on courses that aim to address the educational needs of elders by providing opportunities for them to acquire "the kind of knowledge, skills, and attitudes needed for a high quality of life and well-being in old age" (Tam, 2013, p. 256).

National and Florida OLLI members had similar responses regarding participation experience with a Massive Open Online Course (MOOC), usage of technology (laptop, desktop, iPad or other notebook device), social media networking (Instagram, YouTube, or other photo or video sharing site) are similar between national and Florida OLLI members. Relocation after retirement among Florida members was lower than in the national sample. This makes sense because Florida is the state with the highest population of the retirees.

As the number of technology proficient retirees continues to grow, it is important that OLLI directors revisit their strategic plans in several areas. First, given that the national profile indicates that current members are primarily female retirees, OLLI directors might provide some courses specifically targeting older male members. Including underrepresented populations, culturally diverse groups, as well as increasing accessibility for physically handicapped members may also increase participation.

Another major issue is programming. It will be important for OLLI directors to broaden the range of course disciplines offered and to experiment with course scheduling, including length of classes and frequency of class meetings, to ascertain member preferences are met at the local levels. In addition, it would be useful to increase annual social and intellectual events that meet at least twice each academic year. These types of event might help to increase interest in OLLI offerings and attract new members. Where possible, they might also plan a minimum of one discussion class or lecture series each year on current events and/or social and cultural trends important to OLLI members.

Finally, it seems that OLLI directors and other stakeholders should continue to strengthen existing campus and community partnerships, as well as cultivate new collaborations within the university. It remains important for OLLI directors and other stakeholders to build stronger bridges between the OLLI membership and senior university administrators and faculty members. To this end, it might be important to increase OLLI member presence at university events. There are many actions, which can be taken to help OLLI programs remain successful. However, systematic planning and program evaluation at the state and local levels are essential in order that programs improve and meet future challenges.

Implications

The findings from this study have implications for the adult education field, OLLI administrators, OLLI members, and OLLI instructors for better recognizing and understanding emerging trends in the older adult population.

Adult education field. This study's findings help to demonstrate a broader understanding of lifelong learners in their late adulthood who are also in a higher education setting. There currently is relatively information about this specific population in the adult education literature. This study informs how lifelong learners seek knowledge and also the kind of patterns of retirees that exist in the national arena and in Florida.

Administrators. The results of this study may give a more accurate representation of the Florida OLLI members to OLLI directors allowing them to better understand their population. The findings from this study may encourage OLLI directors to review the procedures they use to determine the subject areas of the courses they

will offer as well as the information they use to develop their annual budgets for advanced planning. One implication of this study is that it may be useful for OLLI directors to use OLLI member focus groups to provide information about which subjects OLLI members want to study. They might also give OLLI directors the ability to more accurately decide how many classes to offer in a year or a semester based on OLLI members' preference for subjects.

Where possible, Florida OLLI directors should design their programs according to member preferences and demand. Given that there are strong preferences in 'history', 'fine arts', 'current affairs/public policy', and 'literature' then OLLI directors should add more emphasis on 'technology and computing', 'religion, philosophy and spirituality' courses, which this study found to be are the differences in expressed preferences between national and Florida OLLI members.

In addition, Florida OLLI program directors could also engage in program assessment through the use of questionnaires or social media in order to better understand the needs and preferences for their adult students who are over 55 years of age. The findings from this research might help OLLI directors to understand the connection between high enrollment classes and scheduling classes.

The social media networking preference results of this study suggests that OLLI directors should be aware of the social media preferences of their members in order to communicate more effectively with lifelong learners about their programs and to improve the recruitment of new students. For example, few of the OLLI members in the Florida sample used Facebook but 35 indicated they used Twitter. Also, social media use among older adults should grow over the coming decades.

One of the findings of this study was that most retirees are taking lifelong learning classes five years after their retirement. As an important life transition, it may be that recently-retired adults need several years to establish and explore their preferences for the next stage of life. This is very important information for OLLI directors to know so that they can approach their students at appropriate times and with targeted programs.

In the past, OLLI directors may have assumed that they all would all encounter the same issues because they believed that their participants were a homogeneous group. The results from the present study suggest that perception may not be accurate.

The findings from the present study support the recommendation by Delp and Rogers (2011) that OLLI directors need to put more effort in widening their membership base in order to develop more comprehensive inclusivity. It is important that OLLI directors determine effective strategies that will attract more males, ethnic and linguistic minorities, and individuals who did not complete a college degree. One method to increase male participants would be to target the local military retirees in the Tampa area. This could be done by collaborating with the military base in the area and by offering more courses related to current events. In a similar manner, lifelong learners who are not college graduates might be recruited through collaborative efforts with public libraries, book stores, and churches. Advertisements in these locations through a poster campaign would increase awareness and also the potential for their participation. These same locations could also be useful in attracting ethnic minorities.

OLLI members. Results of the study have an indirect impact on OLLI members by improving the services that they receive. These findings might positively influence

Florida OLLI members to know the ranking of courses by Florida OLLI members so it might help them envision what kind of courses they may want in the future. As lifelong learning institutes generally solicit member-volunteers to help run their programs, the results of this study can also inform lifelong learning participants who are also active program leaders and instructors. Many OLLI members are volunteers who teach the classes as retired teachers. This is a highly effective method of peer-teaching and learning, which is characteristic of OLLIs. They can design their own curriculum and encourage the OLLI learners as a good example themselves.

OLLI instructors. One of the interesting findings of this study was about course delivery modality, and this can help OLLI instructors design programs for future OLLI members. Although decades of research, since the beginning of OLLI programs indicate that OLLI members are a homogeneous group, the demographic factors and reported preference learning modes between national and Florida OLLI members are significantly different in the current study. The results of previous studies might have influenced curriculum designers in regards to the homogeneity of this population. It is important that OLLI curriculum designers and instructors as well as administrators and others promoting lifelong learning practices, are aware that current retirees are more diverse and technologically proficient than in the past. Thus, OLLI directors might make OLLI instructors aware of this profile change in their local populations.

Recommendations for Future Research

With a few exceptions, the literature has portrayed older adults as a homogeneous group relative to age, gender, race/ethnicity, and income level. The results from this study suggest that this portrayal may not be completely accurate. The

majority of profiles of participants at both the national and Florida participants are the same: highly educated white females, over 55 years old, and of higher socio-economic status. However, the results from this study indicate that the national and the Florida samples showed clear differences with respect to preferences for courses, preferences for use of educational technology, and preferences for use of social media.

This suggests that further research is needed at the state level to more accurately determine the local needs and preferences of current OLLI members within the various states, and also to determine whether there are program barriers that prevent the increase of OLLI membership. For example, some older adults may be hampered by personal mobility issues as well as by limited means of transportation for attending courses at distant locations.

In particular, more studies are needed that address the reasons for the current low participation rates of ethnic minority retirees in OLLI programs and also to identify methods to increase their participation. Based on feedback from the Florida OLLI directors, there is an increased need for a more comprehensive study that would identify the barriers OLLI participants encounter in deciding whether they would want to volunteer in the organization. For the future, the survey would be useful for contributing to the growth of the Institute. More research should also be conducted that clearly identifies what course offerings the participants are interested in including, what kinds of subject areas may be of interest in the future, and what class length they may prefer. Furthermore, OLLI directors can develop a continuous class such as a series on successful leadership in the world (ex, Alexander the Great, Napoleon, Churchill, etc.). For special occasions, OLLI could adapt a gift card system for lifelong learning. The

children of retirees can buy a gift card for OLLI services, such as technical training (ex, Skype, Microsoft office, etc.).

There is evidence in the data to demonstrate that Florida OLLI members, regardless of their level of formal educational attainment, are pursuing intellectual stimulation. The present study's findings indicate that the Florida OLLI sample are highly educated because only 3.16% of the OLLI members stopped at the high school level. Therefore, more than 96% pursue education after high school. This may be because the Florida OLLI sample does not reflect the student population from only one state. Since many OLLI members are volunteers in their organization, they are highly motivated. Future research that examines barriers to OLLI participation such as costs, health, or mobility could be also addressed as well as other variables, such as motivation and learning goals.

This study was conducted using primarily quantitative methods. However, it did employ four open-ended responses, which reveal interesting results. This suggests that a similar study of OLLI members could be conducted that employed primarily qualitative methods in order to determine more in-depth and differentiated responses from OLLI members. Quantitative research conducted for comparison between non-Florida and Florida could provide a deeper understanding of this population.

In addition, this study focused on defining OLLI members and their preferences and experiences as program participants. However, little research has focused on OLLI program directors such as OLLI directors' study of how they well prepare of their job and characteristics of successful manager. A study in this area seems to be warranted.

References

- AARP. (2004). *Baby boomers envision retirement II: Survey of baby boomers' expectations for retirement*. Washington, DC: AARP. Retrieved from http://assets.aarp.org/rgcenter/econ/boomers_envision.pdf.
- Aday, R. H. (2003). *The evolving role of senior centers in the 21st century*. Senate special committee on aging. Retrieved from http://www.indiana.edu/~leisure/module2/unit3_LA2/readings/Aday-Role%20of%20Sr%20Ctrs.pdf
- American Association of Retired Persons. (2000). *AARP survey on lifelong learning*. Washington, DC: Harris Interactive.
- Barnes, L. L., Mendes de Leon, C. F., Wilson, R. S., Bienias, J. L., & Evans, D. A. (2004). Social resources and cognitive decline in a population of older African Americans and whites. *Neurology*, 63, 2322–2326.
- Baumgartner, L. M. (2001). Four adult development theories and their implications for practice. *Focus on basics. Connecting Research and Practice*, 6(B), 3–6.
- Beisgen, B. A., & Kraitchman, M. C. (2003). *Senior centers: Opportunities for successful aging*. New York: Springer.
- Bennett, D., Schneider, J., Tang, Y., Arnold, S., & Wilson, R. (2006). The effect of social media networks on the relation between Alzheimer's disease pathology and level of cognitive function in old people: A longitudinal cohort study. *The Lancet Neurology*, 5(5), 406–412.
- Blanchard-Fields, F., & Kalinauskas, A. S. (2009). Challenges for the current status of adult developmental theories: A new century of progress. In M. C. Smith & N. Defrates-Densch (Eds.), *Handbook of research on adult learning and development* (pp. 3–33). New York: Routledge.
- Boshier, R., & Riddle, G. (1978). Education Participation Scale factor structure for older adults. *Adult Education*, 28(3), 165-175.
- Brady, M., Cardale, A., & Neidy, J. (2013). The quest for community in Osher Lifelong Learning Institutes. *Educational Gerontology*, 39(9), 627-639.

- Brady, M., & Hanson, J. (2014). *Pilot result presentations: Demographic and behavioral trends in the Osher Lifelong Learning Institute* Retrieved from <http://olliuci.files.wordpress.com/2014/02/results-of-national-survey-spring-2014.pdf>
- Bynum, L. L., & Seaman, M. A. (1993). Motivations of third-age students in learning-in-retirement institutes. *Continuing Higher Education Review*, 57(1), 12–22.
- Clark, M., & Cafarella, R. (Eds.) (1999). *An update on adult development theory: New ways of thinking about the life course*. In *New directions for adult and continuing education*. San Francisco, CA: Jossey-Bass.
- Cohen, G. (2005). *The mature mind*. New York: Basic books.
- Cohen, J. (1992). A power primer. *Psychological Bulletin*, 112(1), 155.
- Cresswell, J. (2008). *Educational research: Planning, conducting and evaluating quantitative and qualitative research* (3rd ed.). Upper Saddle River, NJ: Pearson Education Inc.
- Creighton, S., & Hudson, L. (2002). Participation Trends and Patterns in Adult Education: 1990-1999 (NCES 2002–119). Washington, DC: U.S. Department of Education, National Center for Education Statistics.
- Cross, J. (2014). *Motives and barriers affecting participation in lifelong learning activities by older adults* (Doctoral dissertation). Retrieved from ProQuest Dissertations and Theses. (UMI 1525890)
- Daniel, D. E., Templin, R. G., & Shearon, R. W. (1977). The value orientations of older adults toward education. *Educational Gerontology*, 2, 33–42.
- Davey, J. (2002). Active aging and education in mid and later life. *Aging & Society*, 22, 95-113.
- Delp, C., & Rogers, A. (2011). Inclusivity: Journey of enrichment. *The LLI Review*, 6, 24–29.
- Department of Health and Human Services. (2010). *Administration on aging. FY 2010 Report to Congress*. Retrieved from http://www.acl.gov/NewsRoom/Publications/docs/AOA_2010_AnnualReport.pdf
- Dillman, D. A., Smyth, J. D., & Christian, L. M. (2014). *Internet, Phone, Mail, and Mixed-Mode Surveys: The Tailored Design Method* (4th ed). John Wiley, NJ: Hoboken.
- Duay, D. L. & Bryan, V. C. (2006). Senior adults' perceptions of successful aging. *Educational Gerontology*, 32, 423–445.

- Einstein, E. E. (2008). *Creating lifelong learning: Implications for implications for instructional design*. (Doctoral dissertation). Retrieved from ProQuest Dissertations and Theses. (UMI 3304473)
- Erikson, E. H. (1956). The problem of ego identity. *Journal of the American Psychoanalytic Association*, 4, 56–121.
- Fisher, J. C. (1986). Participation in educational activities by active older adults. *Adult Education Quarterly*, 36(4), 202–210.
- Fisher, J. C. & Wolf, M. A. (1998). Using learning to meet the challenges of older adulthood. In J. C. Fisher & M. A. Wolf (Eds.), *New directions for adult and continuing education*: No. 77 (pp. 1–3). San Francisco: Jossey-Bass.
- Fisher, J. C. (1993). A framework for describing developmental change among older adults. *Adult Education Quarterly*, 43, 76–89.
- Fullerton, H. N. (1999). Labor force participation: 75 years of change, 1950–98 and 1998–2025. *Monthly Labor Review*, 3–12.
- Gall, Gall, & Borg. (2003). *Educational research: An introduction*. (7th ed). Boston: Allyn and Bacon. 621-622.
- Gendell, M. (2001). Retirement age declines again in 1990s. *Monthly Labor Review*. Retrieved from www.bls.gov/opub/mlr/2001/10/art2full.pdf.
- Gould, R. (1978). *Transformations: Growth and change in adult life*. New York, NY: Simon & Schuster.
- Gow, A. J., Pattie, A., Whiteman, M. C., Whalley, L. J., & Deary, I. J. (2007). Social support and successful aging. *Journal of Individual Differences*, 28(3), 103–115.
- Havighurst, R. J. (1972). *Developmental tasks and education* (3rd ed.). New York, NY: David McKay.
- Hiemstra, R. (1975). *The older adult and learning*. Lincoln, NE: Department of Adult Education, University of Nebraska. (ERIC Document Reproduction Service No. ED117371)
- Hiemstra, R. (1976). Older adult learning: Instrumental and expressive categories. *Educational Gerontology*, 1, 227-236.
- Hiemstra, R., & Sisco, B. (1990). *Individualizing instruction: Making learning personal, empowering, and successful*. San Francisco, CA: Jossey-Bass.

- Hunt, M. L. (2006). A construction of twelve lifelong learners' perspectives: An in-depth, naturalistic study of self-integration of learning. University of Nebraska Lincoln.
- Jarvis, P. (2001). *Learning in later life: An introduction for educators and careers*. London: Kogan Page.
- Kleiner, B., Carver, P., Hagedorn, M., & Chapman, C. (2005). *Participation in adult education for work-related reasons: 2002-03*. U.S. Department of Education, National Center for Education Statistics. Washington, DC: U.S. Government Printing Office. Retrieved from <http://nces.ed.gov/pubs2006/2006040.pdf>.
- Kim, A., & Merriam, S. B. (2004). Motivations for learning among older adults in a learning in retirement institute. *Educational Gerontology, 30*, 441–455.
- Lakin, M., Mullane, L., & Robinson, S. (2007). *Framing new terrain: Older adults and higher education*. Washington, DC: American Council on Education.
- Lakin, M., Mullane, L., & Robinson, S. (2008). *Mapping new directions: Higher education for older adults*. Washington, DC: American Council on Education.
- Landis, J. R., & Koch, G. G. (1977). The measurement of observer agreement for categorical data in biometrics. *U.S. National Library of Medicine, 33*, 159–174. Retrieved from <http://www.ncbi.nlm.nih.gov/pubmed/843571>
- Lamb, R., & Brady, M. E. (2005). *Participation in lifelong learning institutes: What turns members on?* Portland, ME: University of Southern Maine Osher Lifelong Learning Institute. Retrieved from www.usm.maine.edu/olli/national/pdf/usM-What_turns_Members_On.pdf
- Lamdin, L., & Fugate, M. (1997). *Elderlearning: New frontier in an aging society*. Washington, DC: American Council on Education.
- Laslett, P. (1989). *A fresh map of life*. London: Weidenfeld & Nicolson.
- Lightfoot, K., & Brady, E. M. (2005). Transformation through teaching and learning: The story of Maine's Osher Lifelong Learning Institute. *Journal of Transformational Education, 3*(3), 221–235.
- MacNeil, R., & Teague, M. (1987). *Aging and leisure: Vitality in later life*. Englewood Cliffs, NJ: Prentice Hall.
- Malami, L. (2001). *Open door for the baby boomers: The community college prepares to meet the lifelong learning needs of an aging population* (Doctoral dissertation). Retrieved from ProQuest Dissertations and Theses. (UMI 3027425)

- Manheimer, R. J., Snodgrass, D. D., & Moskow-McKenzie, D. (1995). *Older adult education: A guide to research, programs, and policies*. Asheville, NC: North Carolina Center for Creative Retirement, University of North Carolina at Asheville.
- Manheimer, R. J. (2005). The older learner's journey to an ageless society: Lifelong learning on the brink of a crisis. *Journal of Transformative Education*, 3(3), 198–213.
- Martin, C. L. (2002). *Learning in retirement institutes: The impact on the lives of older Adults* (Doctoral dissertation). Retrieved from ProQuest Dissertations and Theses. (UMI 3039375)
- McClinton, B. E. (2010). *Preparing for the third age: A retirement planning course outline for lifelong learning programs* (Doctoral dissertation). Retrieved from ProQuest Dissertations and Theses. (UMI 1486345)
- McClusky, H. Y. (1974). Education for aging: The scope of the field and perspectives for the future. In S. M. Grabowski & W. D. Mason (Eds.), *Education for the aging*. Syracuse, NY: ERIC Clearinghouse on Adult Education.
- Merriam, S., & Caffarella, R. (1999). *Learning in adulthood: A comprehensive guide*. San Francisco, CA: Jossey-Bass.
- Merrill Lynch. (2006). *The 2006 Merrill Lynch new retirement study: A perspective from individuals and employers*. Washington, DC: Author. Retrieved from www.ml.com/media/66482.pdf
- Miller, S. M. (2000, August 13). Never too late: Seniors who are curious about computers or who want to increase their skills have an enthusiastic mentor in a group called SeniorNet. *St. Petersburg Times Online Tampa Bay*. Retrieved from http://www.sptimes.com/News/081300/news_pf/Northoftampa/Never_too_late.shtml
- Miniño, A. M., Heron, M. P., & Smith, B. L. (2006). *Deaths: Preliminary data for 2004 National Vital Statistics Reports*, 54(19). Hyattsville, MD: Center for Health Statistics. Retrieved from www.cdc.gov/nchs/data/nvsr/nvsr54/nvsr54_19.pdf.
- Narushima, M. (2013). Motivations and perceived benefits of older learners in a public continuing education program: Influence of gender, income, and health. *Educational Gerontology*, 39(8), 569–584.
- National Institute on Aging. (2006). *Dramatic changes in U.S. aging highlighted in new census, NIH report, Impact of baby boomers anticipated*. NIA Press Release. Retrieved from <http://www.nia.nih.gov/newsroom/2006/03/dramatic-changes-us-aging-highlighted-new-census-nih-report>

- Newberry, S. (2013). *Bridging the gap: Identifying perceptions of effective teaching methods for age 50+ baby boomer learners* (Doctoral dissertation). Retrieved from ProQuest Dissertations and Theses. (UMI 3553765)
- O'Connor, D. M. (1987). Elders and higher education: Instrumental or expressive goals? *Educational Gerontology, 13*, 511–519.
- Osher Lifelong Learning Institute (OLLI) National Resource Center. (2014). Web site. Retrieved from www.usm.maine.edu/olli/national/index.jsp
- Osher Lifelong Learning Institute—University of South Florida. (2015). Web site. Retrieved from <http://www.usf.edu/continuing-education/olli/>
- Pardasani, M. & Thompson P. (2012). Senior centers: innovative and emerging models, *Journal of Applied Gerontology, 31*(1), pp. 52–77.
- Peterson, D. A. (1983). *Facilitating education for older learners*. San Francisco: Jossey-Bass.
- Philibert, M. (1984). Contemplating the development of the Universities of the Third Age. In E. Midwinter (Ed.), *Mutual aid universities* (pp. 51-60). Beckenham, Kent: Croom Helm.
- Radcliffe, D. (1984). The international perspective for U3A. In E. Midwinter (Ed.), *Mutual aid universities* (pp. 61-71). Beckenham, Kent: Croom Helm.
- Rafman, C. (1997). *McGill Institute for learning in retirement: A case study of change in A volunteer-led organization*. (Doctoral dissertation). Retrieved from ProQuest Dissertations and Theses. (MQ37228)
- Riddle, D. (1995). *A brief history of the learning in retirement institute*. Unpublished manuscript, Learning in Retirement Institute, University of South Florida, Tampa.
- Rogers, A. (2011). [Annual Osher Lifelong Learning Institute member survey]. Unpublished raw data.
- Rowe, J. W. & Kahn, R. L. (1998). *Successful aging*. New York: Pantheon Books.
- Sanchez-Gordon S., & Lujan-Mora, S. Web accessibility of MOOCs for elderly students [PDF document]. Retrieved from <https://accessibleit.wordpress.com/2013/10/12/accessibility-considerations-of-moocs-for-elderly-people/>
- Scala, M. A. (1996). Going back to school: Participation motives and experiences of older adults in an undergraduate classroom. *Educational Gerontology, 22*(8), 747–773.

- Schuetze, H., & Slowey, M. (2002). Participation and exclusion: A comparative analysis of non-traditional students and lifelong learners in higher education. *Higher Education, 44*, 309–327.
- SeniorNet. (1999). [SeniorNet annual report]. Unpublished raw data.
- SeniorNet. (2015). Web site. Retrieved from <http://seniornet.org/>
- Sheehy, G. (1976). *Passages: Predictable crises of adult life*. New York: Dutton.
- Silverstein, N. M., Choi, L. H., & Bulot, J. J. (2002). Older learners on campus, *Gerontology & Geriatrics Education, 22*(1), 13–30. doi:10.1300/J021v22n01_02
- Szücs, F. K. (2001). *Motivation of elderhostel participants to enroll in domestic and international programs* (Doctoral dissertation). Retrieved from ProQuest Dissertations and Theses. (UMI 3031140)
- Tam, M. (2013). A model of active ageing through elder learning: The elder academy network in Hong Kong. *Educational Gerontology, 39*, 250–258. doi: 10.1080/03601277.2013.750931
- Tam, M. (2014). A distinctive theory of teaching and learning for older learners: Why and why not? *International Journal of Lifelong Education, 33*(6), 811–820.
- Tamilina, L. (2012). *LLLight project definitions of lifelong learning categories*. Retrieved from http://www.llightineurope.com/fileadmin/lighthouseurope/download/background/wp_7_LLLcategories_position_paper_120322_lt.pdf
- The Bernard Osher Foundation. (2014). Web site. Retrieved from <http://www.osherfoundation.org/>
- The Lifelong Learning Institution (LLI) movement across college and university campuses*. (2015). Web site. Retrieved from <http://www.roadscholar.org/ein/ilrmovement.asp>
- The Mondale Bill of 1975, S. 2497. (1975). "The Lifelong Learning Bill" under the Senator Walter F. Mondale.
- The New School. (2015). Web site. Retrieved from <http://www.newschool.edu/institute-for-retired-professionals/>
- The Pew Research Center. (2014). *Older adults and technology use*. Retrieved from http://www.PIP_Seniors-and-Tech-Use_040314.pdf

- The Road Scholars. (2015). Web site. Retrieved from <http://www.roadscholar.org/about/history.asp>
- Toft, G. S., & Jeserich, N. (2006). *The aging matrix: A scorecard of economics & social participation in Indiana*. Retrieved from http://cac.uindy.edu/Agingworkforce_complete.pdf.
- Tuckett, A., & McAulay, A. (Eds). (2005). *Demography and older learners: Approaches to a new policy challenge*. Leicester, United Kingdom: National Institute of Adult Continuing Education.
- Vellas, P. (1997). Genesis and aims of the Universities of the Third Age. *European Network Bulletin*, 1, 9-12.
- Wirtz, P. H., & Chamer, I. (1989). Motivations for educational participation by retirees: The expressive-instrumental continuum revisited. *Educational Gerontology*, 15, 275-284.
- Wolf, M. A. (1985). *Motivation in Late Life: The Personal Need for Challenge*. Paper presented at the meeting of The National Adult Education Conference, American Association for Adult and Continuing Education. Milwaukee, Wisconsin.
- UNESCO. (1992). *Education for all: An expanded vision monograph II*. Retrieved from <http://unesdoc.unesco.org/images/0018/001842/184256eo.pdf>
- University of California Irvine. (2014). *Demographic and behavioral trends in the Osher Lifelong Learning Institute* [Data file]. Retrieved from <http://olliuci.files.wordpress.com/2014/02/results-of-national-survey-spring-2014.pdf>
- United Nations, Department of Economic and Social Affairs, Population Division. (2013). *World population Ageing 2013*.
- United States Department of Housing and Urban Development. (2008). Indiana income limits [Data file]. Retrieved from http://www.huduser.org/Datasets/IL/IL08/in_fy2008.pdf

Appendices

Appendix A: National Survey

Demographic and Behavioral Trends Survey in the Osher Lifelong Learning Institute

Introduction

Dear OLLI Member;

Periodically we like to take a demographic snapshot of the OLLI community at *the University of Southern Maine*. The information we gather in this survey will help administration understand who attends our program and will also help with future planning. Here are some important things to keep in mind before you complete this survey:

- Your participation is voluntary. If you choose not to participate, it will not affect your current or future relations with OLLI or USM.
- You may skip or refuse to answer any question for any reason.
- This is anonymous research so do not write your name on the survey.
- Other OLLIs will be doing similar research this Fall and Winter.
- Findings from this study will be reported in the OLLI newsletter.

This survey is short – only 14 items – and should take you less than five minutes to complete. Thank you for taking the time to respond.

SURVEY QUESTIONS

Demographics

1. What is your gender?

- a. Female
- b. Male

Appendix A: (continued)

2. What is your marital status?

- a. Married/Partnered
- b. Single
- c. Widow(er)

3. What is your age?

- a. Under 50
- b. 50-54
- c. 55-59
- d. 60-64
- e. 65-69
- f. 70-74
- g. 75-79
- h. 80-84
- i. 85-89
- j. 90 and over

4. What is the highest level of education you have completed?

- a. Some high school
- b. High school
- c. Some college
- d. College
- e. Some graduate school
- f. Graduate school

5. What is your current employment status?

- a. Fully retired
- b. Work part-time
- c. Work full-time
- d. Currently seeking employment

6. If not working full-time, how many years ago did you leave full-time work?

- a. 1 – 2 years
- b. 3 – 5 years
- c. More than 5 years
- d. Because of family/home responsibilities, I did not work outside the home

Appendix A: (continued)

7. When did you move to the community in which you now reside?

- a. I grew up in this community
- b. More than 5 years before I (or my spouse if I did not work) left full-time work
- c. Five years before to 4 years after I (or my spouse if I did not work) left full-time work
- d. More than 5 years after I (or my spouse if I did not work) left full-time work

Technology Use

8. Which, if any, of the following technologies do you use? (Check all that apply)

- a. Laptop or desktop computer
- b. iPad or other notebook device
- c. Smart phone (iPhone, Android, Blackberry, etc.)

9. Which, if any, of the following social media networking sites do you regularly use? (Check all that apply)

- a. Facebook
- b. LinkedIn
- c. Instagram, YouTube, or other photo or video-sharing site

Course Delivery

10. I have taken at least one OLLI course that was a blend of face-to-face and online learning.

- a. Yes
- b. No

11. I have taken an OLLI course that was 100% online.

- a. Yes
- b. No

12. I have participated in online courses or lecture series that were not affiliated with OLLI, for example, iTunes University, a Massive Open Online Course (MOOC), etc.

- a. Yes
- b. No

Appendix A: (continued)

Location preference

13. To what extent has proximity to an Osher Lifelong Learning Institute or other university-based lifelong learning program influenced your decision about where to live after leaving full-time work?

- (a) It was a major factor in my decision
- (b) It mattered to me but was only one of many factors
- (c) It was not a factor in my decision

Preferred subject

14. My primary areas of interest in the OLLI courses I take are as follows (please choose your top three):

- a. Fine arts (e.g., music, theatre, studio art, film)
- b. Literature
- c. Foreign languages
- d. History (regional, United States, International)
- e. Current affairs/public policy
- f. Business, finance, economics
- g. Science and mathematics
- h. Technology and computing
- i. Photography
- j. Crafts
- k. Health and wellness (e.g., exercise, nutrition)
- l. Religion, philosophy, spirituality

Thank you! The Survey is Complete!

Appendix B: Florida OLLI Survey, 2015

Demographics

1. What is your gender?

- a. Female
- b. Male

2. What is your marital status?

- a. Married/Partnered
- b. Single
- c. Widow(er)

3. What is your age?

- a. Under 50
- b. 50-54
- c. 55-59
- d. 60-64
- e. 65-69
- f. 70-74
- g. 75-79
- h. 80-84
- i. 85-89
- j. 90 and over

4. What is the highest level of education you have completed?

- a. Some high school
- b. High school
- c. Some college
- d. College
- e. Some graduate school
- f. Graduate school

Appendix B: (continued)

5. What is your current employment status?

- a. Fully retired
- b. Work part-time
- c. Work full-time
- d. Currently seeking employment
- e. Other (please specify)

6. If not working full-time, how many years ago did you leave full-time work?

- a. 1 – 2 years
- b. 3 – 5 years
- c. More than 5 years
- d. Because of family/home responsibilities, I did not work outside the home

7. When did you move to the community in which you now reside?

- a. I grew up in this community
- b. More than 5 years before I (or my spouse if I did not work) left full-time work
- c. Five years before to 4 years after I (or my spouse if I did not work) left full-time work
- d. More than 5 years after I (or my spouse if I did not work) left full-time work

Technology Use

8. Which, if any, of the following technologies do you use? (Check all that apply)

- a. Laptop or desktop computer
- b. iPad or other notebook device
- c. Smart phone (iPhone, Android, BlackBerry, etc.)
- d. Other (please specify)

9. Which, if any, of the following social media networking sites do you regularly use? (Check all that apply)

- a. Facebook
- b. LinkedIn
- c. Instagram, YouTube, or other photo or video-sharing site
- d. Other (please specify)

Appendix B: (continued)

Course Delivery

10. I have taken at least one OLLI course that was a blend of face-to-face and online learning.

- a. Yes
- b. No

11. I have taken an OLLI course that was 100% online.

- a. Yes
- b. No

12. I have participated in online courses or lecture series that were not affiliated with OLLI, for example, iTunes University, a Massive Open Online Course (MOOC), etc.

- a. Yes
- b. No

Location preference

13. To what extent has proximity to an Osher Lifelong Learning Institute or other university-based lifelong learning program influenced your decision about where to live after leaving full-time work?

- (a) It was a major factor in my decision
- (b) It mattered to me but was only one of many factors
- (c) It was not a factor in my decision

Preferred subject

14. My primary areas of interest in the OLLI courses I take are as follows (please choose your top three):

- a. Fine arts (e.g., music, theatre, studio art, film)
- b. Literature
- c. Foreign languages
- d. History (regional, United States, International)
- e. Current affairs/public policy
- f. Business, finance, economics
- g. Science and mathematics
- h. Technology and computing
- i. Photography
- j. Crafts

Appendix B: (continued)

- k. Health and wellness (e.g., exercise, nutrition)
- l. Religion, philosophy, spirituality
- m. Other (please specify)

Appendix C: Sample Size Table

Table C1

Sample Size Based on Effect Size, Alpha, Power, and Degree of Freedom with Variables (IVs)

Variable	Effect size	Alpha	Power%	df	Sample size <i>n</i>
gender,	Small	0.05	80	1	785
course	Medium	0.05	80	1	88
delivery	Large	0.05	80	1	32
married	Small	0.05	80	2	964
status,	Medium	0.05	80	2	108
location	Large	0.05	80	2	39
preference,	Small	0.05	80	3	1091
technology	Medium	0.05	80	3	122
use	Large	0.05	80	3	44
employment	Small	0.05	80	5	1283
status,	Medium	0.05	80	5	143
relocation	Large	0.05	80	5	52
level of	Small	0.05	80	9	1565
education	Medium	0.05	80	9	174
age	Large	0.05	80	9	63
preferred	Small	0.05	80	11	1681
subject	Medium	0.05	80	11	187
	Large	0.05	80	11	68

Appendix D: Results of Reliability Test

Table D1

Results of Reliability Test Includes Each Answer Option

Questions	Question number	Answer choice	Reliability
Demographics	1-7	Choose one	1.00
Technology Use	8	Laptop or desktop computer	1.00
		iPad or other notebook device	0.80
		Smart Phone	1.00
		Other	1.00
Social media networking sites	9	Facebook	0.80
		LinkedIn	1.00
		Instagram, YouTube, or other Photo or video-sharing site	1.00
		Other	0.80
Course Delivery Methods	10	Blended	1.00
	11	100% online	1.00
	12	MOOC	0.80
Relocation after retirement	13	Major factor	1.00
		One of many factors	0.80
		Not a factor	1.00
Subject Preference	14	Fine Arts	1.00
		Literature	1.00
		Foreign Languages	1.00
		History	0.60
		Current Affairs	1.00
		Business, Finance, Economics	1.00
		Science and Mathematics	1.00
		Technology and computing	1.00
		Photography	1.00
		Crafts	1.00
		Health and wellness	0.80
		Religion, Philosophy, Spirituality	1.00
		Others	1.00

Appendix E: IRB Approval Letter



RESEARCH INTEGRITY AND COMPLIANCE
Institutional Review Boards, IWA No. 00001669
13901 Bruce B. Downs Blvd., MDC035 • Tampa, FL 33613-1795
(813) 974-5638 • FAX(813)974-7091

September 14, 2015

Jung Min Lee
L-CACHE - Leadership, Counseling, Adult, Career & Higher Education
Tampa, FL 33647

RE: Exempt Certification

IRB#: Pro00019123

Title: A Comparative Analysis of Demographic and Reported Preferential Learning Modes of Florida and Non-Florida Osher Lifelong Learning Institutes (OLLI) Members.

Dear Ms. Lee:

On 9/14/2015, the Institutional Review Board (IRB) determined that your research meets criteria for exemption from the federal regulations as outlined by 45CFR46.101(b):

(2) Research involving the use of educational tests (cognitive, diagnostic, aptitude, achievement), survey procedures, interview procedures or observation of public behavior, unless:

(i) information obtained is recorded in such a manner that human subjects can be identified, directly or through identifiers linked to the subjects; and (ii) any disclosure of the human subjects' responses outside the research could reasonably place the subjects at risk of criminal or civil liability or be damaging to the subjects' financial standing, employability, or reputation.

Approved Items:

[Guidelines for studies meeting the criteria for exempt review by the IRB_Jung Min Lee.docx](#)

[eirb change aug 14 2015.docx](#)

As the principal investigator for this study, it is your responsibility to ensure that this research is conducted as outlined in your application and consistent with the ethical principles outlined in the Belmont Report and with USF HRPP policies and procedures.

Please note, as per USF HRPP Policy, once the Exempt determination is made, the application is closed in ARC. Any proposed or anticipated changes to the study design that was previously declared exempt from IRB review must be submitted to the IRB as a new study prior to initiation

Appendix E: (continued)

of the change. However, administrative changes, including changes in research personnel, do not warrant an amendment or new application.

Given the determination of exemption, this application is being closed in ARC. This does not limit your ability to conduct your research project.

We appreciate your dedication to the ethical conduct of human subject research at the University of South Florida and your continued commitment to human research protections. If you have any questions regarding this matter, please call 813-974-5638.

Sincerely,

A handwritten signature in black ink that reads "John A. Schinka, Ph.D." The signature is written in a cursive style with a large initial 'J'.

John Schinka, Ph.D., Chairperson
USF Institutional Review Board

Appendix F: Email Reminder to the OLLI Members

Dear Ms. Toohey,

413 OLLI-UNF members completed the survey. I believe it will be great if you send out a 'reminder' to the members who had not responded with "second notice". However, I could not find a way to send an email those who have not completed the survey. The other directors just mentioned (Please, ignore this email if you completed the survey) in the beginning of the email. The survey is an anonymous so there is impossible to send a friendly reminder to the members who didn't participate the survey. I am so sorry about that. Please, let me know if you have any concerns or questions.

Thanks again,

Jackie Lee

Appendix G: Email to the Florida Directors to Explain the Research and Included Results of the Pilot Study of OLLI-USF

Dear colleagues: hope this finds you well and your OLLIs thriving!

I'm writing to follow up on a message I sent some of you back in April. I've been working with a doctoral student in Adult Ed, Jackie Lee. Jackie's dissertation research involves developing a profile of FL OLLI members and comparing/contrasting that with a national sample. She'll be using Jack Hansen's and Mike Brady's data for the latter.

I'm hoping some (or all!) of you will consider doing the former: surveying your members to better understand who they are and what they want from their OLLI.

A big ask, I know. We're all busy with TOO much to do. Here's how we can make it more manageable for you.

1. We've already developed the survey.
2. We would customize the survey to **your** organization. For comparability, Jackie will want to keep as many of the questions as possible intact. Some of the questions come from the national survey: some are targeted to our OLLI and its concerns. There is the ability to customize the survey where there are specific questions or answer options that would meet **your** OLLI's needs. There will be as many versions of the survey as FOLLIs who participate. You would have your own link with access to your survey data anytime. If you have a SurveyMonkey account, the survey could be set up on your account, with your logo and color scheme.
3. The survey can (ideally) be sent as a link in an email message or eblast. We followed up with paper copies for those members who requested a paper copy OR who aren't comfortable with the online format.

Still reading? Good. Here's the sort of output that SurveyMonkey provides. This link will take you to our member survey, which is still collecting responses. You can see the questions and view the resulting data in graphic or numerical format.

Go here to see our survey results: <https://www.surveymonkey.com/results/SM-GLM97B88/>
(Yikes! I'm really showing you the dirty underbelly of OLLI-USF here!)

If you are interested in conducting a survey of your members like this, I hope you'll let me know so I can connect you with Jackie directly. Jackie will do as much of the set up work as she possibly can; you would only need to send the link to your members. I will be on vacation over the next two weeks, so you have an opportunity to consider this a little, discuss it with your leaders, etc.

We survey our members approximately every two years. It is a great opportunity to see how your organization develops over time and to help address issues and concerns.

Appendix G: (continued)

Thanks for considering this request!
Appreciatively,
Ara

Ara Rogers, Ph.D.

Director, Osher Lifelong Learning Institute
University of South Florida
4202 E Fowler Ave NEC116
Tampa, FL 33620

813-974-5263

www.usfseniors.org

www.facebook.com/olliusf

Appendix H: Figures for Comparison Between Non-Florida and Florida OLLIs

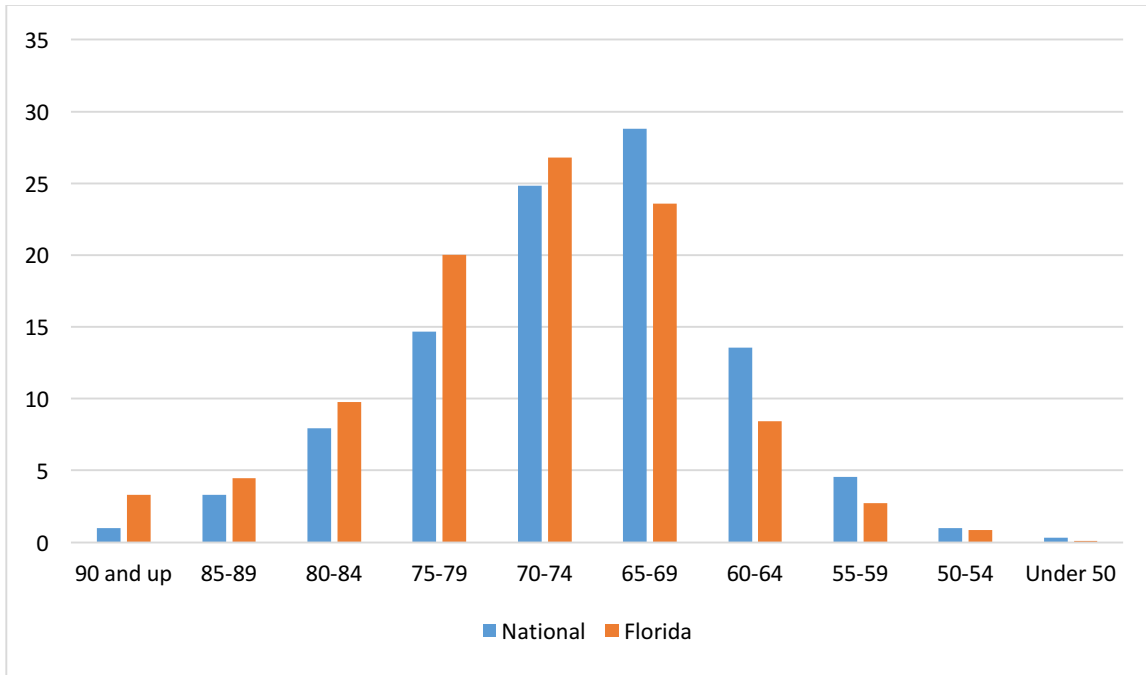


Figure H1. Comparison between national and Florida age difference

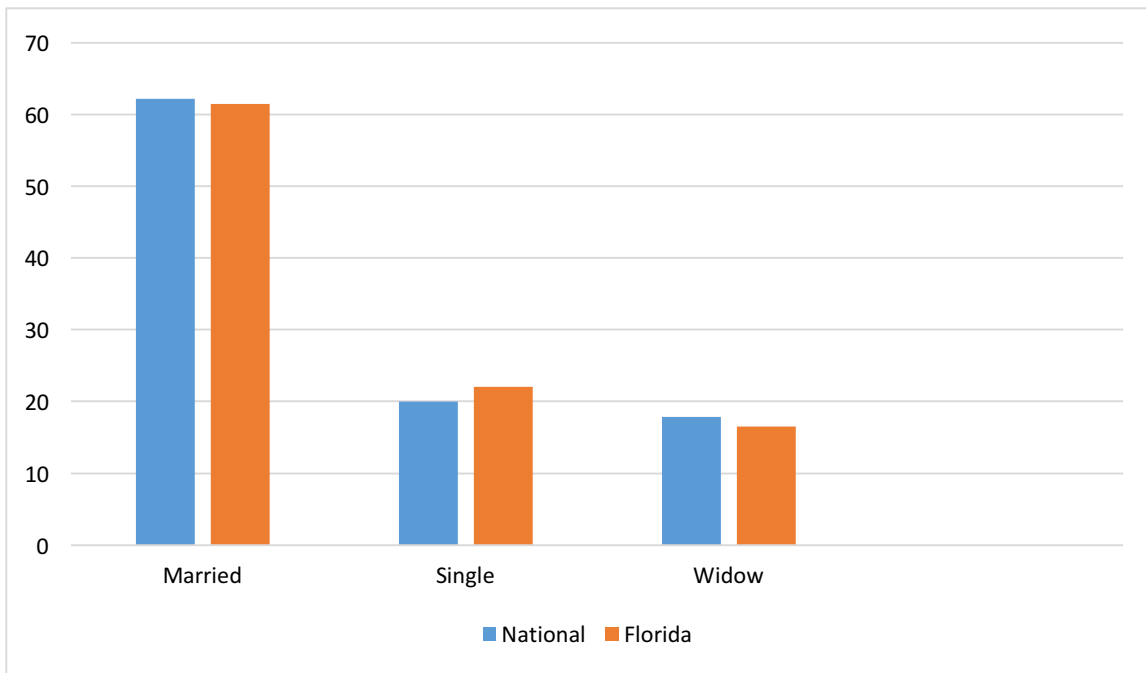


Figure H2. Comparison between national and Florida marriage status

Appendix H: (continued)

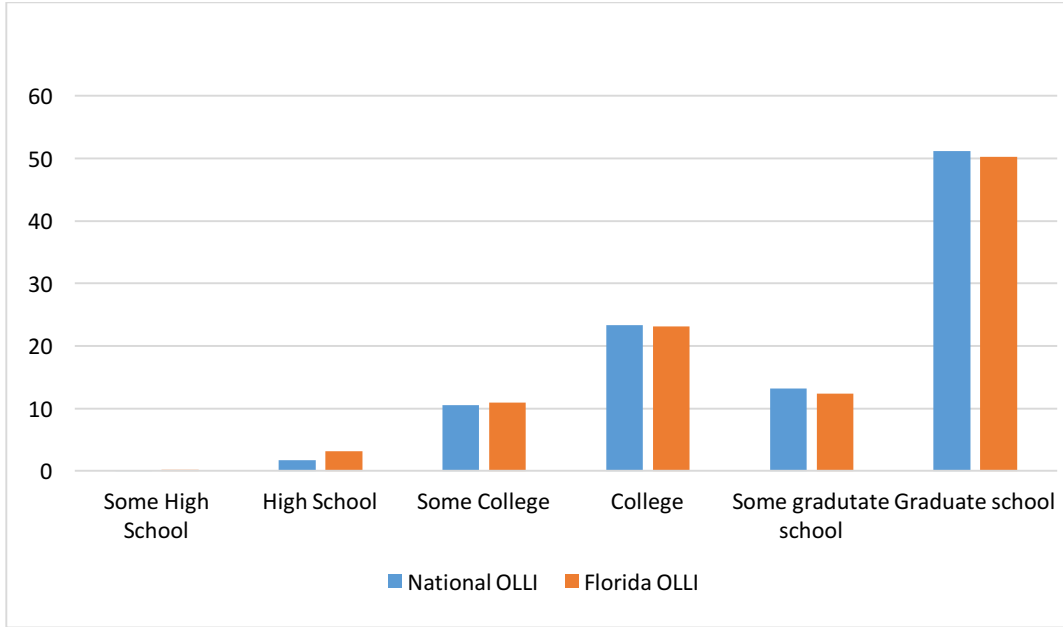


Figure H3. Comparison between national and Florida educational level

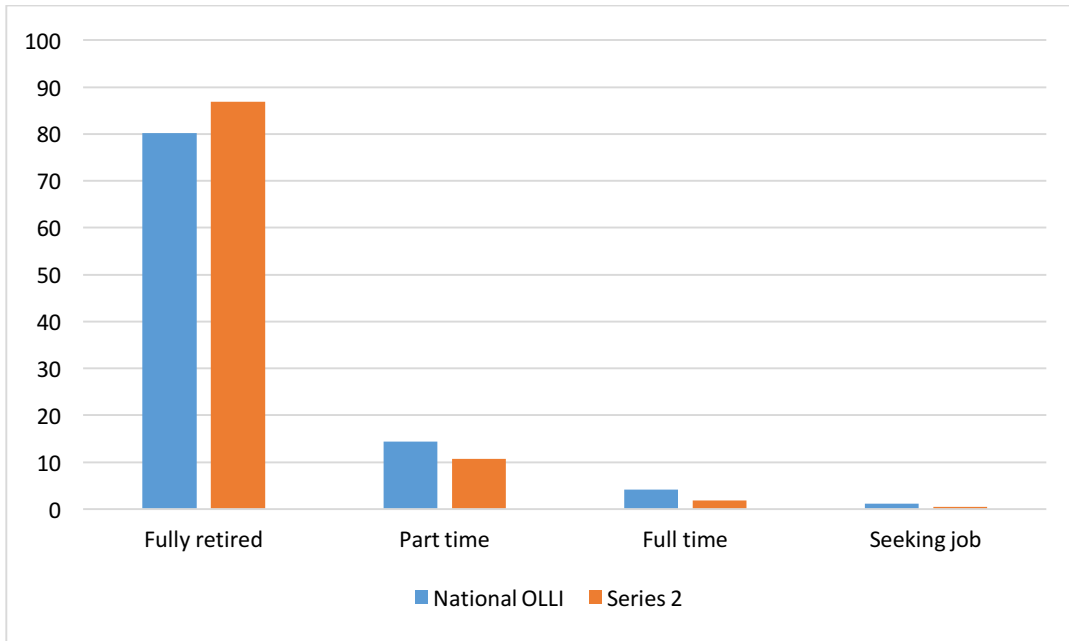


Figure H4. Comparison between national and Florida employment status

Appendix H: (continued)

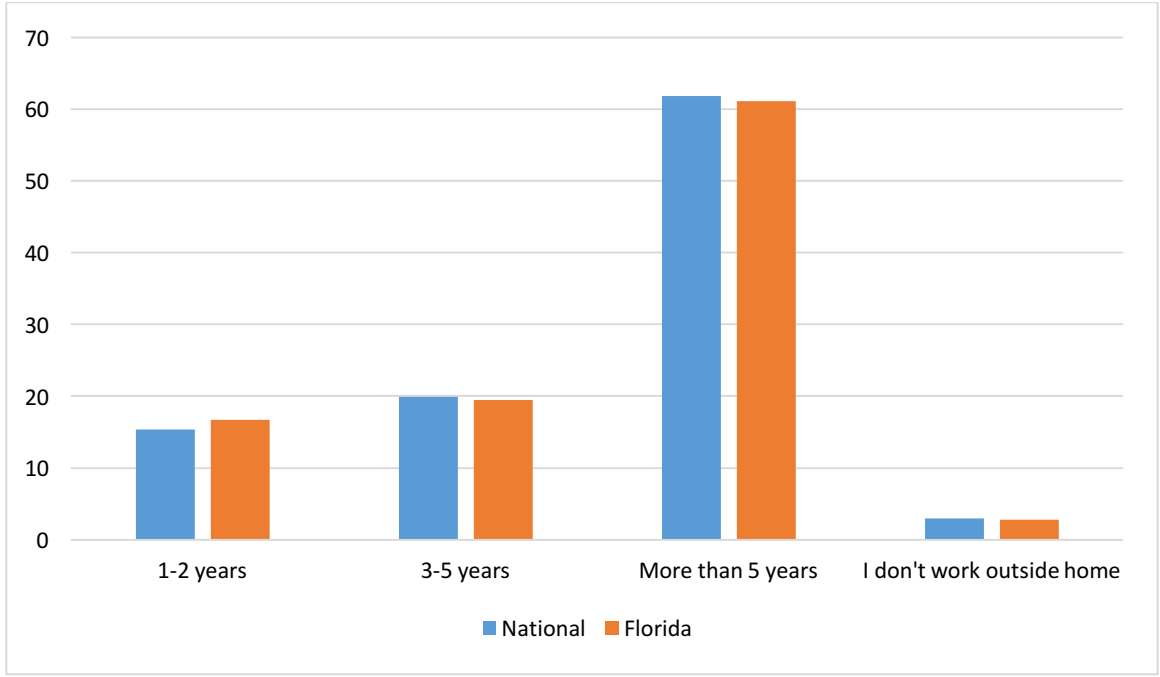


Figure H5. Comparison between national and Florida number of years after retirement

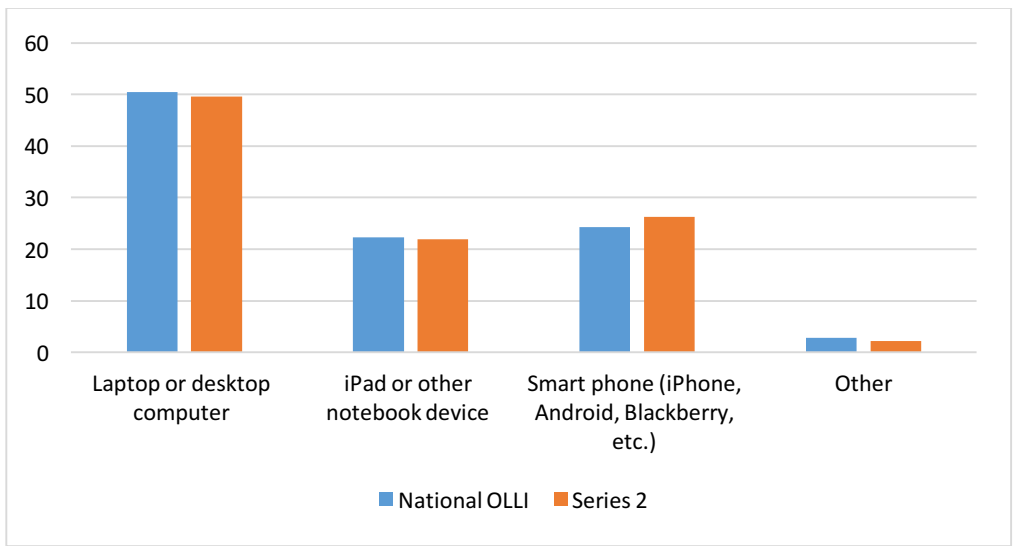


Figure H6. Histogram of data in technology usage

Appendix H: (continued)

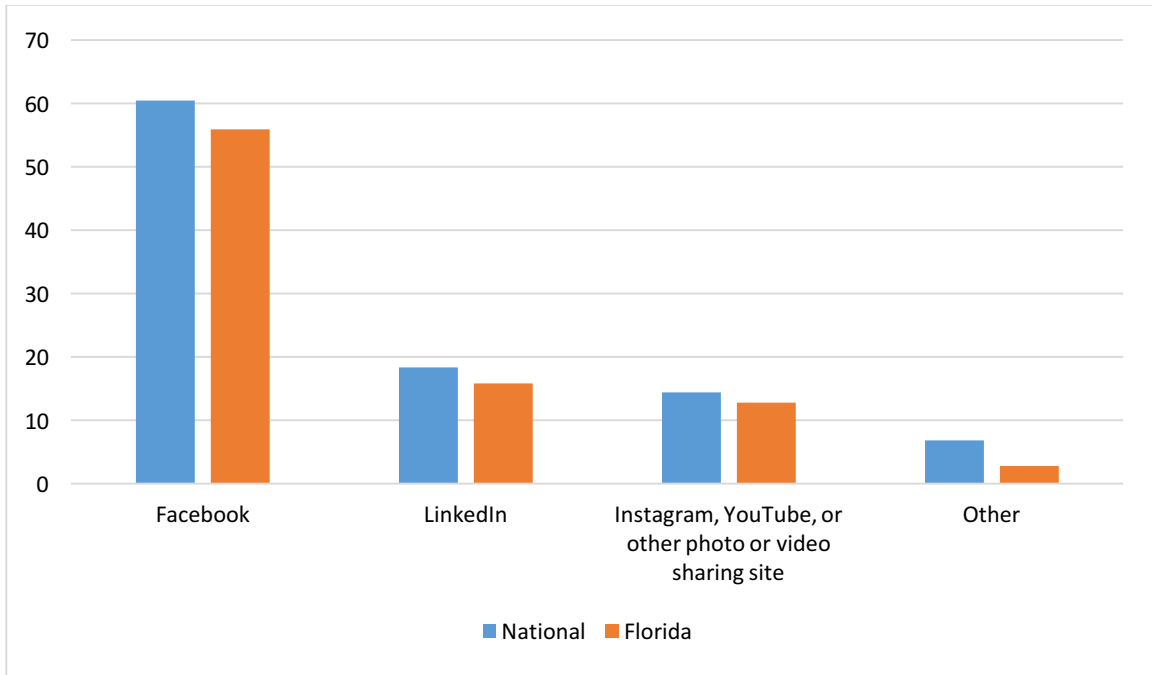


Figure H7. Histogram of data in social media networking.

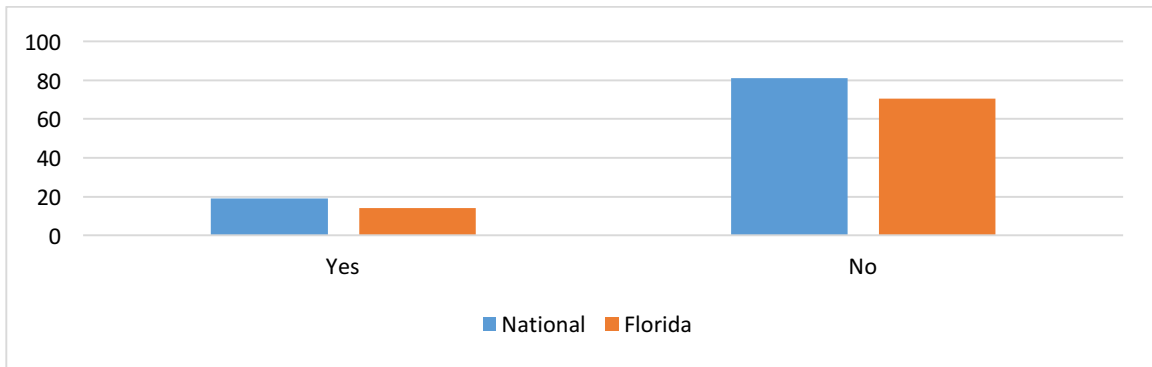


Figure H8. Histogram of data in participating MOOC.

Appendix H: (continued)

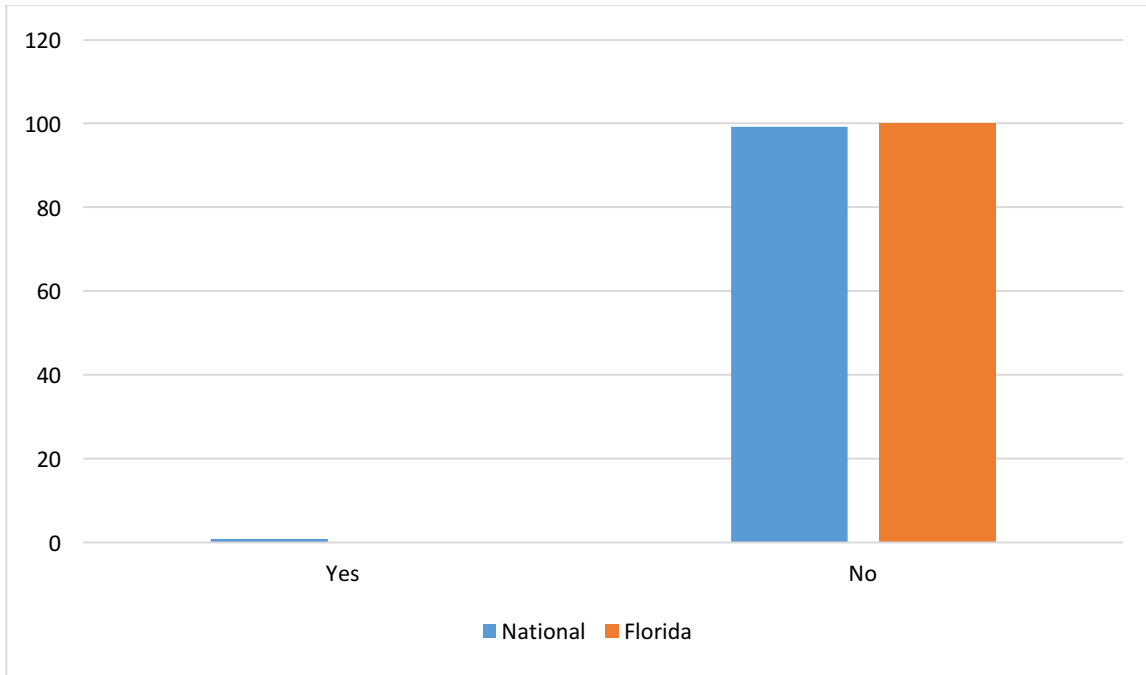


Figure H9. Histogram of data in participating 100% online.

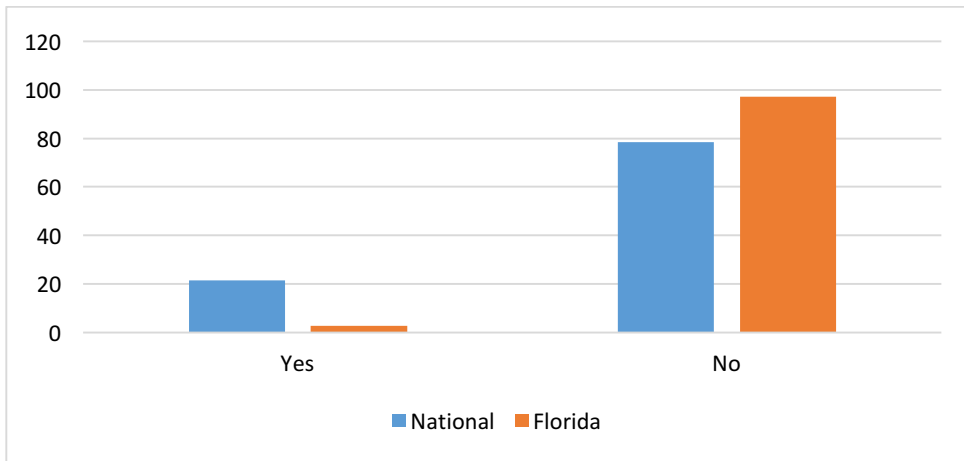


Figure H10. Histogram of data in participating blended class.

Appendix H: (continued)

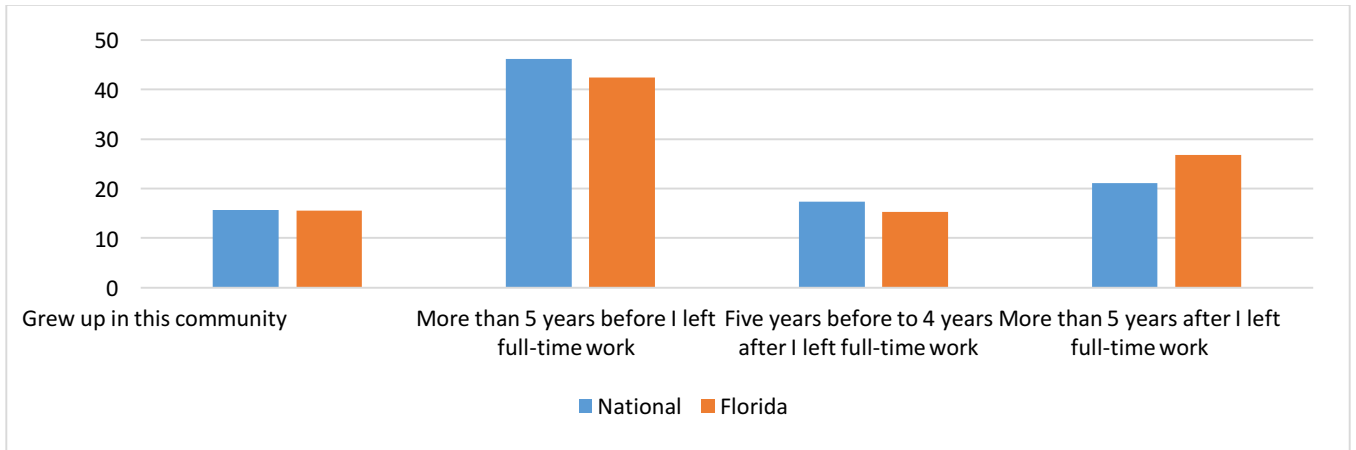


Figure H11. Histogram of data in preference of relocation after retirement

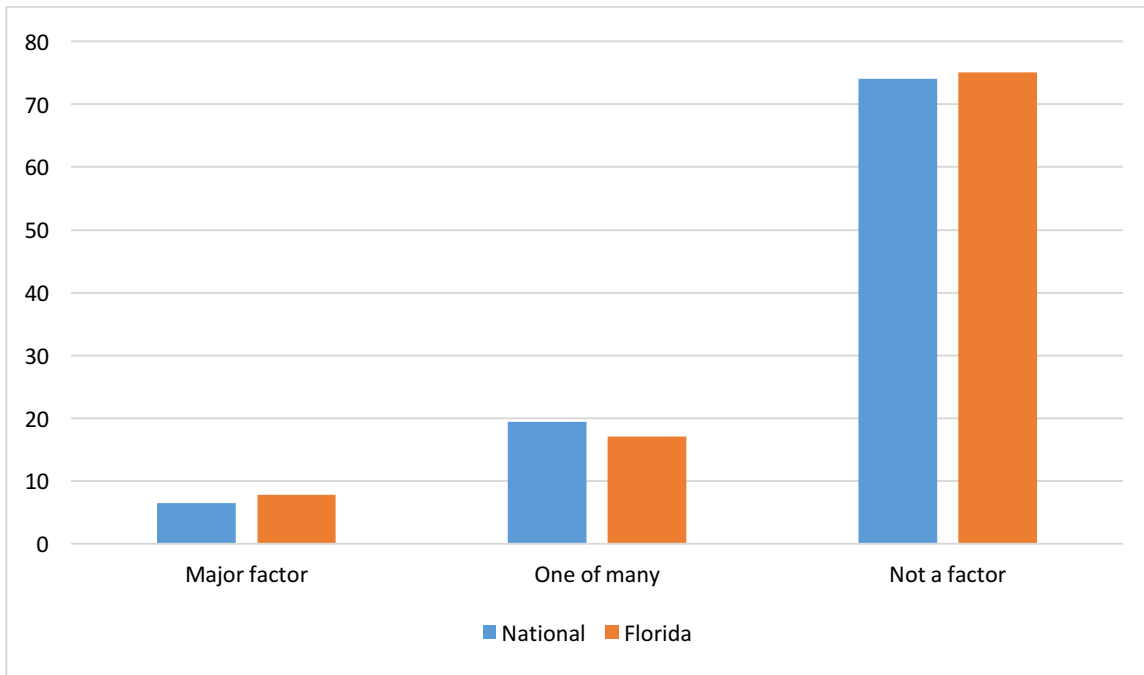


Figure H12. Histogram of data in major factor of relocation after retirement

Appendix H: (continued)

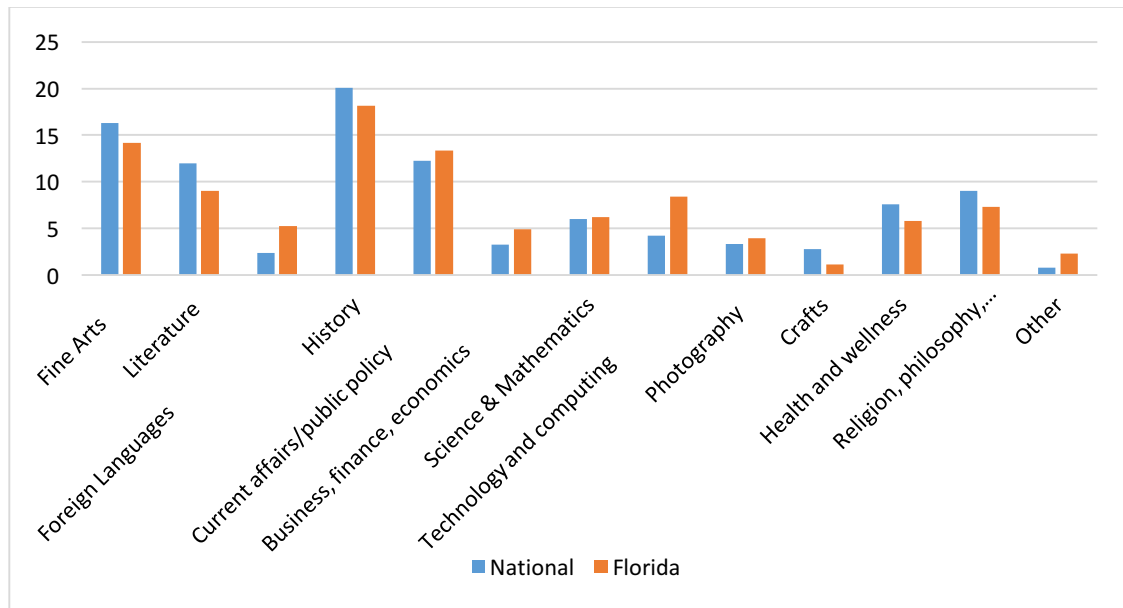


Figure H13. Histogram of data in subject preference

Appendix I: List of Other Comments on Preference of Technology Use

Table I1.

List of Other Comments on Preference of Technology Use

Responses	<i>n</i>
Digital camcorder & Cameras	9
E-reader	8
Car technology such as GPS	7
Printer or scanner	6
Organizer, graphing calculator, and typewriter	5
Music devices	2
Medical device such as a blood pressure monitor	2
PowerPoint	2

Appendix J: List of Other Comments on Preference of Social Network

Table J1

List of Other Comments on Preference of Social Media Network

Responses	<i>n</i>
None of above	69
Twitter	35
Google groups	9
Skype	5
Pinterest	5
I have accounts in all but don't use them regularly	4
Dropbox	3
YouTube	2

Appendix K: List of Other Comments on Preference of Subject Areas

Table K1

List of Other Comments on Preference of Subject Areas

Responses	<i>n</i>
Writing-Memoir, fiction, creative and nonfiction writing	20
Psychology	7
Bridge II	5
Music	3
Film	2
Game (Word Play)	2
Workshops	2
Foreign languages	2
Improvisation	2

Appendix L: Lists of Florida Osher Lifelong Learning Institutes

Table L1

Lists of Florida Osher Lifelong Learning Institutes

6 Osher Lifelong Learning Institutes in
Florida

Eckerd College

Florida International University

Florida State University

University of North Florida

University of Miami

University of South Florida

n= 6887

Appendix M: Demographics of Florida from Census 2015

Table M1

Demographics of Florida from Census 2015

People	Florida	USA
Population, 2014 estimate	19,893,297	318,857,056
Population, 2010 (April 1) estimates base	18,804,623	308,758,105
Population, % change - April 1, 2010 to July 1, 2014	5.8%	3.3%
Population, 2010	18,801,310	308,745,538
Persons 65 years and over, %, 2014	19.1%	14.5%
Female persons, %, 2014	51.1%	50.8%
White alone, %, 2014	77.8%	77.4%
Black or African American alone, %, 2014	16.8%	13.2%
American Indian and Alaska Native alone, %, 2014	0.5%	1.2%
Asian alone, %, 2014	2.8%	5.4%
Native Hawaiian and Other Pacific Islander alone, %, 2014	0.1%	0.2%
Two or More Races, %, 2014	2.0%	2.5%
Hispanic or Latino, %, 2014	24.1%	17.4%
White alone, not Hispanic or Latino, %, 2014	55.8%	62.1%
High school graduate or higher, % of persons age 25+, 2009-2013	86.1%	86.0%
Bachelor's degree or higher, % of persons age 25+, 2009-2013	26.4%	28.8%
Private nonfarm establishments, 2013	510,389	7,488,353
Private nonfarm employment, 2013	7,134,644	118,266,253
Private nonfarm employment, % change, 2012-2013	2.9%	2.0%
Non employer establishments, 2013	1,838,864	23,005,620

About the Author

Jung Min Lee earned a Bachelor's degree in English Education from Mokwon University (Daejeon, South Korea) in 2000, and a Master's degree in Curriculum and Instruction with an emphasis in Teaching English as a Second Language at Texas A&M University (College Station, TX) in 2005. Ms. Lee entered the University of South Florida's graduate program in 2007 in Second Language Acquisition/Instruction and Technology, before transferring to Adult Education in 2008. She worked in the University's ESOL office, in the Office of the Dean of the College of Education, and for the David C. Anchin Center for the College of Education. Her research interests include lifelong learning, continuing education, and teaching English as a Second Language.