

**Investigation of the Persistence Factors and Barriers  
Experienced by Mid-life Learners Returning to Post-secondary Education**

by

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## Abstract

The world today is one of employability related lifelong learning, hence continually learning a living<sup>1</sup>. In the Canadian Province of Ontario, there has been a shift in the economy from a manufacturing base toward various service sectors. Changes in technology, outsourcing of work, and business closures have resulted in an increase demand for further post-secondary education by displaced workers. Workers either are trying to stay relevant through formal learning or are reskilling into new careers. Mature adults, who have been away from the classroom for a long time, often have situational and operative psychological factors that are quite different from younger learners. The purpose of the research, using interpretive qualitative methods, is to explore and examine the motivations and barriers encountered by mid-life learners returning to post-secondary education funded by Ontario's Second Career Program. As the Second Career Program has only been existence since 2008, there has been virtually no research focused on these mature learners or the success of the program. The knowledge gained would inform mature adults on the challenges inherent in their return to studies after a long absence. Post-secondary institutions may need to address the different needs of the older student with adjustments or additions to their current support systems. This research seeks to identify completion barriers experienced, the persistence factors, and motivational drivers utilized by mature adults in their return to studies. These issues, and revealed subsidiary outcomes, are explored in the context of one post-secondary institution actively recruiting Second Career learners thus experiencing a high intake of those mature adult students.

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<sup>1</sup> The term "Learning a Living" may well have been originally coined by University of Toronto professor emeritus Robert K. Logan, Ph.D. in his book *The Fifth Language: Learning a Living in the Computer Age*. (1997). Toronto: Stoddart Publishing.

## **Acknowledgements**

Any learning journey would not be possible without the support and encouragement of colleagues, course mates, teachers, friends, the post-secondary staff who provided information and facilitated the flow of paperwork and, especially, the volunteer participants in this research. Special thanks to, Cecile Badenhorst, Ph.D., my thesis supervisor, who tirelessly reviewed, corrected and provided suggestions that were more than merely helpful. Her patience and endurance are remarkable.

If this thesis is the culmination of one phase of an academic career, then significant influences from the past should be recognized even though some are no longer with us to light the way. One such influence was my high school English teacher, Owen McHale; many of his words are still with me today. Arthur Rosenwinkle had unending passion for his subject, the fundamentals of electricity, and was a living demonstration of a better way to think and be. Ernest Sukowski, Ph.D., who celebrated 50 years of teaching in 2012, was a pivotal influence in the academic journey. His lively teaching style and enthusiasm for his discipline deflected me from what would have been an unproductive academic path.

A special thanks to all those teachers that do not give up on underachievers. Some of us underachievers do turn out to be late bloomers and become lifelong learners.

## **Definition of Key Terms and Abbreviations**

**Academic bridging:** Programs for newcomers to Canada to fill education gaps or other professional requirements, and/or to provide focused education to meet specific requirements for licensure and employment.

**College.** A post-secondary institution of applied arts and technology. Student-centred in orientation. Specifically in this proposal, those types of institutions found in Ontario.

**Delayed entry.** Adults who have returned to education after an absence of some time. Authors differ in defining the time period, but this research will use five or more years.

**HEQCO.** Higher Education Quality Council of Ontario. An advisory agency on various education matters funded by the Ontario Ministry of Training, Colleges, and Universities.

**ICEHR.** Interdisciplinary Committee on Ethics in Human Research at Memorial University of Newfoundland. Responsible for ethical approval of proposed research on human participants

**Mid-life learners/student/adult.** Those currently aged 40 to 65+ years old.

**Mature adult/student/learner.** Those individuals over the age of 40.

**Non-traditional learners/students.** Individuals returning to voluntary education after a minimum five-year absence.

OMTCU. Ontario Ministry of Training, Colleges and Universities. Government ministry responsible for funding, and policy directions for post-secondary education in Ontario.

Post-secondary education. Voluntary education after the legal requirement. In this proposal, university or college level courses and programs.

REB. Centennial College's Research Ethics Board. Responsible for ethical approval of proposed research on human participants

Second Career. An Ontario program funded under OMTCU to subsidize adult learners who have been permanently laid-off from their jobs for a significant period to reskill in demand work areas.

Traditional post-secondary learners. Those directly coming from secondary institutions to post-secondary. This includes those who have had less than a five-year interruption in their education.

University. A post-secondary institution offering a full range of liberal arts and sciences courses and degreed programs ranging from bachelors' through doctoral levels. Typically, teacher-centred in orientation. Specifically in this proposal, those types of institutions found in Ontario.



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## **Chapter 1: The Mid-life Demographic, the Environment, and the Research**

### **Introduction**

Extensive socioeconomic research has been carried out on the lives and experiences of current mid-life adults (Althouse, Rose, Allan, Gitman, & McDaniel, 2008), yet little research literature exists on this generation's voluntary or involuntary<sup>2</sup> return to formal studies (Clemente, 2010; Colegrave, 2006). Midlife enrolments (older adult students) represent elevated numbers over those reported ten years ago (academic year 2003/2004) by post-secondary institutions (HEQCO, 2013). Although the classroom composition has become increasingly multi-generational, there is lack of Canadian research on the persistence and completion barriers, situational experiences, and motivational factors employed by the mid-life adults in their educational pursuits (Clark, Moran, Skolnik, & Trick, 2009; Clemente, 2010; Colegrave, 2006; Kerr, 2011; McNair, 2012).

The mid-life demographic, ranging in from age 40 to 65, represents a large percentage of the current Canadian population. Individuals in this 40 to 65 age group were born over a period that saw an extraordinarily high birth rate (Statistics Canada, 2011). Steed (2007) has referred to this so-called Baby Boom generation as a "demographic tsunami." The post-World War II era beginning in 1945 starts a period of an unexpectedly high birth rate that continued for over 20 years. During this time, there was a population increase in Canada of 15%, totalling more than 8.2 million births (Statistics Canada, 2011) (Appendix 1). Throughout their lives, the midlife generation

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<sup>2</sup> Involuntary return to education would mean the mature adults had not previously considered pursuing further education until their jobs disappeared and they needed to reskill for jobs that were in demand.

has significantly influenced a wide variety of socioeconomic factors, including career and lifestyle preferences. The individualistic tendencies of this age group created a desire for customized products and services that led to innovations and design changes of tangibles, such as clothes and automobiles, to intangibles, such as vacation packages and other leisure time activities<sup>3</sup> (Althouse et al., 2008; Foot & Stoffman, 1996; Moses, 1999; Sheehy, 1996; Steed, 2007). The midlife age group is highly educated, relative to preceding generations. Midlife adults are accustomed to view education as a pathway to a better life (Durkin, 2012; HRSDC, 2006; Sheehy, 1996). Adults over the age of 40 represent an increasing percentage of formal post-secondary enrolments and informal learning session attendees (Merrill, 2007).

Traditional post-secondary learners, those coming directly from secondary schools, represent a gradually decreasing percentage of the total number of post-secondary enrollees. Many high school graduates are delaying post-secondary studies for a few years and choosing to work for a time instead, typically for financial reasons. Today's classrooms have average student ages that are higher than in the past (Canadian Learning Council, 2008; Clark et al., 2009). Older individuals have come to recognize their employment prospects and potential career growth are limited by their previously adequate education level. This has resulted in a wider age range, with an elevated average age, populating today's post-secondary institutions. The typical post-secondary classroom of today is multigenerational (Canadian Learning Council, 2008; Clark et al., 2009; Clemente, 2010; Hango, 2011).

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<sup>3</sup> The oldest children of today's mid-lifers will be begin entering mid-life in a few years thus keeping the 40 to 65 age group numbers high. The influence on post-secondary education opportunities by today's mid-life learners and their children could last for well over 50 years (University of Western Ontario, 2011).

## **Background: The Ontario Economy, Adult Learners, and the Second Career Program**

A combination of economic and Ontario government policy factors affecting mature adults have caused displaced workers to consider and participate in post-secondary education. Many of these mature adults had likely believed their school days were over. The need to reskill to improve employability in today's job market became a viable option with funding from the Ontario government's Second Career Program.

### **Economic Factors Affecting Mature Adults**

Gera and Mang (1997) analyzed Canada's industrial structure in the context of the whole economy from 1971 to 1991. They reported that the traditional drivers of the economy, manufacturing and construction, were slowly but progressively losing ground to knowledge-based employment sectors. Workplaces that required mostly unskilled labour to operate successfully often employed large numbers of workers. Increased growth rates in higher technology manufacturing sectors, employing fewer but more skilled workers, has caused a decline in low-technology industries. The pace of growth in knowledge-based industries has been increasing in speed<sup>4</sup>. Gera and Mang pointed out that the rate of change is not increasing in the overall economy. It is the relative change in sectoral relationships, due to individual sector changes, that have tended to redistribute

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<sup>4</sup> Spencer (2006) takes a different approach in discussing the new knowledge-based economy. He examined three sectors of the Canadian economy as primary – resources and agriculture, secondary – manufacturing and construction, and tertiary – government, personal, financial. Spencer acknowledges that there has been movement away from resources, pointing out that manufacturing was never dominant from 1920 to 2006. Manufacturing was and still is an important component of the Canadian economy even though it has been in decline. What has grown is the tertiary sector, which now generates its own set of needs.

the human resource requirements. Workers are displaced in some sectors while other sectors are hiring (Gera & Mang, 1997). Displaced workers' skills often do not match the requirements of the hiring firms.

Policy Horizons Canada (2012), a human resources agency within the Canadian federal government, indicated that the manufacturing sector in Canada has declined from 17% to 13% of Gross Domestic Product (GDP) from 2002 to 2012. Although new manufacturing methods and technologies continue to be implemented, the revitalization of the manufacturing will take 10 to 15 years for there to be an appreciable improvement. Policy Horizons Canada's (PHC) less optimistic forecast is that the new methods and technologies would allow manufacturing to remain at the same GDP level rather than decline further. The main prediction of the PHC report was that there would be continued manufacturing job losses in the future. On a positive note, the service sectors have expanded to employ 78% of Canada's workforce, which translates to 72% of GDP (Policy Horizons Canada, 2012).

In Ontario, long known as a significant Canadian economic driver (particularly for its manufacturing sector), there has been a steady decline in available employment. Manufacturing has been severely impacted, across the sector, with slight to dramatically reduced production or complete plant closures. Employment in manufacturing has fallen 28% from 2002 to 2012 (Statistics Canada, 2012).

Krzepkowski and Mintz (2013) in a University of Calgary, School of Public Policy research paper suggest that the Ontario manufacturing sector situation has been exacerbated by a number of globalization factors. The major factors include the parity of the U.S. and Canadian dollars and the impact of the global 2008/2009 financial crisis.

This has taken a heavy toll on Ontario's workforce. Ontario had long enjoyed unemployment rates lower than the national average and unemployment is now above this average. Krzepkowski and Mintz (2013) stated "Ontario manufacturing over the last decade . . . fell as a share of total employment from 18 per cent in 2000 to 11.5 per cent in 2011" (p.3).

Fundamental changes in the Ontario economy have contributed to two significant factors that have impacted Ontario's workforce, which in turn puts pressure on post-secondary institutions. The first factor is the combined effects of a shift to service oriented businesses and the growth of the knowledge-based economy that has resulted in staff reductions and permanent business closures (OMTCU, 2013). The manufacturing sector, previously the main driver in the Canadian economy, has led an overall decline in Ontario's economic fortunes since 2003. The retail sector has pushed manufacturing into second place in the Ontario economy. Manufacturing faces the possibility of falling second to third place in Ontario's economy in the near term due to pressure exerted by the service sector<sup>5</sup>. The job tasks of the service sector require different employability skill sets than manufacturing and are on average less financially rewarding (Statistics Canada, 2012; OMTCU, 2013). Workers' manufacturing related skills are now in low demand. Consequently, the need to reskill, especially for laid-off workers became obvious to themselves and to government.

The factor complicating this bleak employment picture was the 2008/2009 worldwide financial crisis. This sudden economic downturn severely affected Ontario's

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<sup>5</sup> The service sector includes intangibles such as personal care (e.g. hair stylists), hospitality (e.g. hotels, restaurants), and leisure time activities, such as sports both participation and spectator (Lamb, Hair, McDaniel, Kapoor, & Shearer, 2013).

manufacturing sector. Fully 36% of Canada's newly unemployed during the period from 2008 to 2011 were Ontario workers. Although these unemployed workers were better educated than those displaced in earlier recessions, 84% of these displaced workers had less than a university education. Approximately 40% were older than 45 years of age and these workers were typically long service employees (Chan, Morissette, & Frenette, 2011).

### **Ontario: An Economy in Transition**

Miner<sup>6</sup> (2010) in a Colleges Ontario research report stated there has been fundamental transformation of Ontario's economy. The economy continues to evolve with an ever-expanding service sector and a proportionately less significant manufacturing sector. This has affected and is affecting the employability of an increasing number of Ontario's unskilled and semi-skilled workers. The general labour pool skills, and in particular the manufacturing sector workers, are being rendered unsuitable with the advance of new technologies and the steadily increasing numbers of knowledge economy jobs. It is projected by 2016 there will be 450,000 workers unqualified for the emerging job vacancies. The number of unqualified workers has been predicted to rise steadily to 700,000 in a few years thereafter. Ontario's future economic sustainability will be negatively affected in the absence of additional education and training to reskill workers (Miner, 2010).

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<sup>6</sup> Rick Miner, Ph.D., President Emeritus of Seneca College (2001-09) formerly Vice-President, University of New Brunswick. See: <http://www.innovation.ca/en/AboutUs/Governance/Members/BiographyRickMiner>

## **The Economy, Demographics, and Post-secondary Education**

Usher and Dunn (2009) stated, in a report sponsored by the Educational Policy Institute, a non-profit research organisation, there are differences in how poor economic times affect post-secondary education compared to more prosperous times. Typically, four-year university undergraduate enrolments are not significantly affected by economic cycles. These enrolments tend to be direct from high school and the individual's motivations often stem from demographic factors such as parental education levels and economic status.

Short programs, those of two to three years in length, are sensitive to economic fluctuations. Traditionally, two-year college programs and graduate studies experience increased enrolments during economic downturns. Canadian college full-time enrolments outpace universities with recession-induced spikes in enrolments (Usher & Dunn, 2009).

A significant economy related labour factor has two parts. In spite of approaching the traditional retirement age, many mid-life adults are electing not to stop working. These non-retirement oriented mature adults were contemplating or were in the process of changing careers. Other mid-life adults are redesigning their concept of a future retirement to one that involves continued work, in some cases as volunteers rather than paid employees, or a variety of new activities (Sheehy, 1995; Holloway, & Leung, 2006; Merrill, 2007). An HSBC 2013 research report, *The Future of Retirement: A new reality*, found that 32% of Canadians of traditional retirement age planned to continue working to some extent. In the same group surveyed, 56% wished to socialize more with friends and



family, 42 to 46% hoped to take frequent holidays and travel. Varying percentages represented active lifestyle pursuits with 9% having no stated plans on how to spend their time in retirement. Holloway and Leung (2008) citing the 2008 HSBC<sup>7</sup> survey reported that, “[o]nly 22% of Canadians believe retirement is a time for rest and relaxation. Instead, the golden years are viewed as a time for reinvention, pursuing lost ambitions and taking on new personal challenges” (para. 1).

A retirement of idleness does seem to be an appealing prospect. Less than half of the current 60 to 65 year olds plan to stop working. Many of those expecting to continue working have no idea when they may elect to retire (Schellenberg & Ostrovsky, 2008). Two strong reasons why mature adults wish to continue working are less than desirable personal financial circumstances or the mid-life adult had officially retired from their long-time main employer and wished to continue working. This second reason is often motivated by the desire to keep active rather than financial necessity (Chrevreau, 2009; Foot & Venne, 2011). Formal education and informal learning can figure prominently in a mid-life adult’s plans to successfully engage in new challenges, achieve their psychologically rewarding aspirations, and improve their financial situation.

Even though older adults may not wish to retire, they will eventually withdraw from the workforce. As older workers exit the workforce, active job seekers (younger people and midlife adult re-entrees) will face an increased demand for higher and different skills than possessed by those previously entering or currently in the labour pool.

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<sup>7</sup> HSBC is an international financial institution originally named The Hongkong and Shanghai Banking Corporation. The older name is no longer used. See: HSBC.com

Post-secondary education or training becomes a requirement to meet the changing needs of the ever-evolving knowledge-based economy. Governments promote and current data supports the employers' requirements for increasing levels and different forms of post-secondary education to be possessed by prospective new hires. Projections indicate that by 2031, 77% of the workforce will require a post-secondary credential (Miner, 2010). The 77% target does not seem unrealistic. Ontario's post-secondary attainment rate in 2010 was 62%, reputedly the highest in the world (Government of Ontario, 2010).

The consequences of aging population in combination with the growing knowledge-based economy makes exacting demands on older workers' skill sets. Employed workers must remain up-to-date either through on the job upgrading or formal education. The worldwide financial crisis of 2008/2009 sparked a wave of cost-cutting measures across varied business sectors. The desire to lower operating expenses often included reductions in company training budgets (Chan et al., 2011; Immen, 2012). Mature adults will either self-fund a return to formal education or rely on government plans, such as Ontario's Second Career Program, to subsidize their learning.

### **Career Changes and Returning to Formal Education**

The factors stemming from an economy in transition that cause workers to be displaced are staff reductions, business terminations, and technology changes that significantly modify or eliminate certain positions. Mature adult workers abruptly

unemployed, with no contingency plan in place, or those fearing imminent displacement are motivated to consider a return to studies to improve their employability.

Mature workers who anticipated an uncertain future and secured alternate employment are classified as voluntary career changers. This category would also include those anticipating and planning for early retirement. Since they are looking toward more personally meaningful, alternative post-retirement employment their learning decisions can be thought through in advance (Government of Alberta, 2010).

Involuntary career changers are those that have been caught unaware of the possibility that business decisions were being made, at times in faraway locations, that would suddenly end their current employment. Involuntary career changers can take little comfort in their long service and satisfactory, at times excellent, employment history. Through no fault of their own, they were displaced due to organizational restructuring, extreme changes in how business would be conducted, or operations that would soon be discontinued. The reasons workers become involuntarily unemployed include outdated skills or job roles, redesign of jobs for safety or health issues, redesign of work due to technology advances that eliminate or combine positions, and outsourcing of work (Government of Alberta, 2010).

Voluntary and involuntary career changers can share similar characteristics and challenges. They can have concerns regarding their lack of experience with and ability to learn new, ever changing technologies. Given that many have had long service with their previous employer, it has been a very long time since they have had to look for a job and be interviewed. Career changers may sense, with some urgency, their need to update skills or re-skill through appropriate education. They can be quite sensitive to their lack

of job search skills. Involuntary career changers in particular may be concerned about their age or mental capabilities (e.g. having to compete with younger students or workers) being an inhibiting factor in making significant learning and employment changes.

### **The Ontario Second Career Program**

Ontario's Second Career Program to reskill displaced workers makes it financially possible for mature adults to undertake employment related post-secondary education. These older adults had not considered further education prior to their being unemployed. Therefore, their turn to post-secondary education cannot be described as being entirely voluntary. The basic assumption of this research paper is that all older students, having been away from formal education for an appreciable length of time, face the same educational, psychological, sociological, and institutional challenges once they begin their studies.

The Ontario government implemented the Second Career Program to reskill displaced workers in June of 2008 (National Adult Literacy Data Base, n.d.; Smolkin, 2012). The program was launched and is maintained by the Ontario Ministry of Training, Colleges and Universities (OMTCU). Qualifying displaced workers may receive up to \$28,000 in order to subsidize their return to formal education. The formal education program selected must be directed toward securing employment. The financial assistance is intended to pay tuition, books, transportation and general living expenses (Ontario Ministry of Training, Colleges and Universities [OMTCU], 2012).

There are a number of strict eligibility criteria that must be met for participation in this program. Some of these criteria are that the applicant must have had an unproductive active job search, be unemployed for minimum period, require specific new skills, and meet program requirements for financial need. The subsidized retraining available is restricted to high demand jobs, and the education/training program objective to improve the worker's employability has to be achievable (OMTCU, 2012).

A 2012 first quarter review indicated that two-thirds of the Second Career Program graduates had found employment within three months (Colleges Ontario, 2010). The Ontario government stated, since inception, more than 65,000 displaced workers have received funding through Second Career with 81 percent securing employment within a year (Government of Ontario, 2014).

The 2012/2013 budget allocated for Second Career would permit the reskilling of 12,000 workers (Smolkin, 2012). The 2006-2007 college enrolments totaled approximately 200,000 students. From 2008 to 2012, there has been 55,000 eligible adults enrolled in Second Career funded training programs. A desired annual enrolment of 12,000 Second Career students will continue to have a noticeable impact on the college system (Colleges Ontario, 2010; OMTCU, 2013).

Miner's (2010) report stated the Second Career program will face future challenges with increasing numbers of displaced workers in need of reskilling. The Second Career program will not be sufficient to resolve the retraining needs of Ontario. Second Career is only part of a larger solution. By 2026, Ontario will need to train or retrain 1.73 million people. The annual number of post-secondary graduates will be more

than 78,000 adults. This is over six times the Second Career Program's present capability (Miner, 2010).

The Second Career Program had been in place for two years at the time of Miner's report. It was obvious at that time many students were not prepared for post-secondary levels of performance, specifically in terms of literacy (Miner, 2010). It is fairly easy to infer why this might be the case. If a current mid-life worker completed high school and went directly into the workforce taking on what is essentially unskilled work, they would likely do little to upgrade their secondary education. Believing they were secure in their employment, there would be little incentive to pursue further formal education. What they learned on the job would be viewed as all that was necessary to perform well and earn a comfortable living. Parkin and Baldwin (2009) reporting on the then latest findings of The Millennium Research Program, plus research by Shaienks, Gluszynski and Bayard (2008), stated that young people felt they were unprepared on many levels for post-secondary education. They believed their high school work did not adequately prepare them for the higher level of effort and quality that those studies demand (Parkin & Baldwin, 2009; Shaienks, Gluszynski, & Bayard, 2008). The attitudes and concerns of delayed entry students can be little different. Displaced workers' academic skills would likely in need of upgrading given their many years away from formal studies.

When the Second Career program began, there was a flood of enrollees. Based on the initial large number of applicants, the Ontario Ministry of Training, Colleges and Universities determined the way to make the program manageable was to have stricter eligibility requirements. Those with the greatest financial need are given priority. Similar to other colleges, Centennial College of Applied Arts and Technology – Toronto,

Ontario, from which the research participants were recruited, conducts information sessions<sup>8</sup> to familiarize Second Career applicants (prospective or approved) with the requirements of Second Career program.

The prospective Centennial College Second Career students are informed that once enrolled they will be expected to achieve the same academic standards as the traditional students. Successful completion of an academic program will involve effort and commitment as well as adjustments to the students' personal lives. They are given summary information on the resources of the college, specifically the various counselling services that are available (Gail Derrington, personal communication, March 11, 2013).

The average age of Second Career students is older than the general college population. These older students typically have additional and different social and home life responsibilities than younger students. In the Centennial College sessions, they are alerted to issues such as conflicting social responsibilities, eldercare, and financial obligations that may represent distractions or barriers to learning the younger students may not encounter. The orientation session lectures are reinforced with an information kit for each attendee (Gail Derrington, personal communication, March 11, 2013).

### **Purpose of the Research**

The purpose of the proposed research is to explore and examine the motivations and barriers encountered by mid-life learners returning to intellectually challenging forms

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<sup>8</sup> Centennial College actively recruits prospective Second Career students to attend these information sessions. See Appendix 2

of learning. The focus of the research is on mature adults, over the age of 40, in the Ontario Second Career Program. The knowledge generated from this line of research can be of general benefit to mid-life adults considering a return to formal education. The research findings would provide prospective midlife learners with current information on the issues surrounding a return to post-secondary education in order to make informed decisions. The research would be of particular interest to Second Career learners whose return to studies became an unexpected necessity.

Research literature on mid-life learners has been sparse. Little research has been undertaken to identify and categorize the motivations for the mid-life learners' return to higher education and the obstacles they encounter (Clemente, 2010; Colegrave, 2006). The existing mid-life learner focused literature has been intermittently produced and often originated outside of Canada, specifically, and North America, generally. In light of this research deficit, a new focused, interpretive qualitative research project can provide useful information to education providers and mid-life learners not only in Ontario, but in the rest of Canada as well. This research will make a modest contribution to the body of Canadian midlife learner literature.

The majority of midlife learner literature that does exist relates generally to adults who are still working or presently retired (Clemente, 2010; Colegrave, 2006). The meagre supply of literature creates difficulties and opportunities for research on the mid-life learners returning to formal studies, specifically related to those wishing to maintain or improve their employability. This research opportunity exists for Ontario's Second



Career mature learners since the program has only been in existence for just over five years.

### **Research Questions**

The purpose of the study is to determine the barriers encountered, and motivational strategies used, by Second Career Program mature adults who persist and complete their areas of post-secondary studies. In recent years, the average age of full time students as drifted upward due to financially motivated delayed entry (Clark et al., 2009; Clemente, 2010). Although the returning mature adults enter multigenerational classrooms, the majority of their classmates are noticeably much younger.

The questions the research on Second Career Program students seeks to illuminate are:

- what are the types of institutional, educational, situational, and motivational barriers encountered by mature adults returning to post-secondary education;
- what are the motivational strategies and tactics implemented by the mature adults in order to persist and complete in their courses and programs;
- what are the social or institutional support mechanisms (i.e., external motivating factors) utilized by the mature learners in order to maintain or revitalize their (internal) motivation to persist and complete?

## **Chapter 2: Literature Review**

### **Introduction**

This literature review presents background information on the psychological factors, learning issues, and economic conditions propelling mature adults toward further education to improve their employability. Achieving the highest possible levels of employment is a concern for the Canadian federal and provincial governments. Unemployed adults often need significant financial support to return to post-secondary studies and maintain those efforts once they have begun. Typically, older adults have been away from formal education for many years. Teaching and learning philosophies, environments, and practises have changed over time. Academic counselling is needed to select appropriate programs from a range of learning alternatives. Once a program of education is selected, there will arise inhibiting attitudinal and situational factors, unforeseen or anticipated, which the older adult learner will have to resolve in order to persist and complete. There are those individuals that will be able to develop strategies and actions on their own. Some will have family and friends to provide emotional support and suggest action steps. Others will need the counselling and advising services of their post-secondary institution. These issues have to be addressed during the current less than favourable economic times and with the reality of an uncertain future.

## **The 2008/2009 Recession, Education, and Assistance Programs**

The majority of institutional and private economic forecasters did not predict the dramatic worldwide financial crisis that began in late 2008. Nonetheless, in late 2006 and early 2007, there were the initial signs of a potential global economic slowdown. A few of the major economic signals that could have alerted economists were financial sector's rise in the overall costs of borrowing, a slowdown in the U.S. housing market coupled with increased numbers of mortgage defaults, all of which contributed to instability in global money markets<sup>9</sup>. The 2008/2009 financial crisis precipitated a reduction in business activity, namely the scale back of operations and bankruptcies (Kenny & Morgan, 2011). This reduced worldwide business activity resulted in large increases in short and long-term unemployment in many business sectors. While this was true for most countries, the effects of, what has been termed the Great Recession, was more severe in a select group of countries, such as the U.S.A. and the UK. In the U.S., unemployment rates and long-term unemployment reached record setting levels. Those with little education and unskilled workers were in the majority of those unemployed. The U.S. is Canada's largest trading partner and soon felt the effects of the U.S. slowdown (Junankar, 2011; Statistics Canada, 2013).

A TD Economics Special Report (Burleton, Gulati, McDonald, & Scarfone, 2013) examined the state of jobs in Canada in the decade from 2002 to 2012. Burleton et al. (2013) stated that a variety of factors, which include regulatory and macroeconomic

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<sup>9</sup> The U.S. has long been the world's largest economy and is interwoven with the global economy. A downturn in major U.S. economic sectors reverberates throughout the globe making a recession an international event (Gokay, 2009).

policies, enabled Canada to better weather the economic downturn of 2008/2009. Relative to other G-7 countries<sup>10</sup>, labour force participation was somewhat higher in Canada while acknowledging that the unemployment rate had increased during the downturn. Over time, the number of medium-skilled jobs had decreased and the demand for low- and high-skilled jobs had increased. While both medium and high skilled jobs need individuals with post-secondary credentials, high skilled workers tend to require more training over the course of their careers (Burleton et al., 2013).

Burleton et al. (2013) took exception to the popular belief, and attendant increasing concern, that Canada was facing a near term skills shortage. However, there was the recognition that “there is some evidence of mismatch across certain occupations and provinces” (p.3). Federal, provincial, and territorial governments were instituting formal policies for skills training and job creation. The authors stated that workers, educators, and employers all needed to play a part in the success of these training and work creation strategies (Burleton et al., 2013).

The Centre for Workplace Skills (CWS)<sup>11</sup> commissioned a research project in 2010, completed in 2011, to investigate the return to full employment programs, i.e., adjustment assistance policies and practices available to displaced workers in Canada. “‘Adjustment’ is a process in which a set of supports are put in place for workers who have lost their jobs (or are in danger of losing their jobs) to help them make a transition into new employment, retirement, education and training, or other life transitions” (Centre for

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<sup>10</sup> The G-7 are countries with world's most advanced economies: Canada, France, Germany, Italy, Japan, the United Kingdom, and the United States.  
See: [http://ec.europa.eu/economy\\_finance/international/forums/g7\\_g8\\_g20/index\\_en.htm](http://ec.europa.eu/economy_finance/international/forums/g7_g8_g20/index_en.htm)

<sup>11</sup> The Centre for Workplace Skills is an organization jointly funded by the Government of Canada, the Canadian Manufacturers and Exporters and the Canadian Labour Congress. See <http://www.workplaceskills.ca/>

Workplace Skills, 2011, p. 3). The impetus for the CWS research project arose directly out of the 2008/2009 global recession. In a short time frame, there were significant number of plant closings that resulted in permanent worker layoffs. Particularly hard hit were Canadian manufacturing sector and the resource based sectors of metals and minerals (Centre for Workplace Skills, 2011).

The CWS research study revealed varying levels of adjustment assistance from the federal and provincial governments. Generally, the programs offer workers job-search assistance in the form of job-hunting and interview skills training. The research report stated there was some funding available for retraining for specific types of workers in employment sectors that are particularly affected by plant closures. Ontario's policies and adjustment assistance efforts were highlighted as doing more for displaced workers with practices of longer duration than other provinces. This level of assistance was due to the high number of Ontario business closures (Centre for Workplace Skills, 2011).

Usher and Dunn (2009) stated that economic downturns have the most impact on short-course education programs. This translates to increased college enrolments as college programs can be completed in one to three years. Higher levels of education translate into higher employability for those with college and university credentials (Statistics Canada, 2012).

### **Federal and Provincial Return to Work Programs**

Governments across Canada desire low unemployment rates as these are indicators of economic prosperity for the majority of citizens. The federal government has improved loan programs, grants, and strengthened Registered Education Savings Plans to

help individuals and families. Funds have been allocated to provinces to improve and add to existing college and university facilities and buildings. The Targeted Initiative for Older Workers (TIOW) program is a federal, provincial, and territorial cost-shared initiative focused on improving the skills of older workers, aged 55 to 64, so they may return to work. The TIOW program applies to workers who reside in what are described as vulnerable communities<sup>12</sup> of less than 250,000 total population (Government of Canada, 2012: 2013a: 2013b; Statistics Canada, 2012b). Other federal government programs are specifically directed toward improving literacy and essential skills, training unemployed young people, aboriginal peoples and persons with disabilities (Government of Canada, 2013c).

The provinces have in turn instituted their own programs to support specific groups to become better educated and thus improving their employability. Provincial programs tend to be similar to the federal program as they are narrowly focused toward the same disadvantaged groups. The retraining programs in provinces tend to rely on funding, in varying degrees, under the federal government's Action Plan. The Action Plan is broad in scope covering not just economic initiatives for jobs and skills training but also stimulus for businesses to compete globally through innovation along with community development and other programs (Government of Canada, 2013a).

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<sup>12</sup> Alasia, Bollman, Parkins, and Reimer (2008) stated the concept of vulnerability has been defined as a community's potential for continuous population decline or other negative outcomes due to deteriorating socio-economic conditions. "The conceptual framework for vulnerability analysis at the community level includes three types of dimensions-indicators: stressors (e.g. exposure to global competition), assets (e.g. human capital), and outcomes (in this context, population decline)" (p.3).

Nova Scotia's Skills Up! program is directed toward non-Employment Insurance eligible African Nova Scotians for a range of employment skills training. The Skills Development program has the objective to improve jobs search skills but it would provide tuition and other education assistance for persons in exceptional circumstances (Government of Nova Scotia, 2013).

New Brunswick's Training and Skills Development (TSD) program, on a case-by-case basis, can provide up to two years of support for a training program, three years for a co-operative training program, and one year for academic upgrading at the primary or secondary level. The level of support is determined by a government employment counsellor. The TSD program's objective is to have those individuals receiving benefits return to work as soon as possible (Government of New Brunswick, 2014). Program details and eligibility criteria are not fully described on the government website nor are there links to specific program information.

Prince Edward Island's SkillsPEI plan receives significant funding through the Canada-PEI Labour Market Development Agreement. SkillsPEI focuses on the typical range of non-employment insurance eligible unemployed persons such as young people, minorities, the disabled, aboriginals, older workers, and low skilled employed persons. The \$2.5 million 2013-2014 SkillsPEI budget is spread thinly across the plan population targets. (Almost \$800,000 is directed toward administration and initiative promotion.) The WorkPlace Training program, which comes under SkillsPEI, provides funds to employers to reduce the costs of employer supported training (Province of Prince Edward Island, 2014).

Quebec has a number of programs similar to other provinces with the focus on developing an individual's job search skills. There is a Wage Subsidy for Older Workers program for those unemployed between the ages 50 to 59. However, the published information is limited and general in nature (Gouvernement du Québec, 2013).

Manitoba makes funds available for training from 12 weeks to 2 years (2 years if the training is for high demand occupations). Current or previous Employment Insurance (EI) claimants can be eligible for skills development assistance if they have few skills, are unemployed or are about to be unemployed. Short-term training focuses on job search skills. Potential qualifying individuals are requested to contact their local Employment Manitoba Centre for details (Government of Manitoba, 2013).

The Government of Saskatchewan's (2009) Multi-Party Training Plan (MPTP) is designed to support the education and skills training needs of northern Saskatchewan First Nations and Métis communities. The program is renewed in five-year terms. The fourth program iteration began in 2009.

Alberta Works currently provides income support as well as career, planning, job-search assistance labour market information, and can assist adults, those over 18 years of age, to get the academic upgrading, language or job skills training. This training can be in the workplace or occur in public or private post-secondary institutions. Support for older unemployed workers is mainly provided under federal government programs (Government of Alberta, 2010: 2013).



British Columbia sponsors several programs for immigrants, training for women in the trades, aboriginals, youths, older workers through the federal Targeted Initiative for Older Workers (TIOW) program, and for non-Employment Insurance (non-EI) older urban workers 55 years of age and older. The education is delivered at provincial employment centres to develop job search skills or through post-secondary institutions for co-ops, apprenticeships, and in conjunction with on-the-job training. The training can last from three to 12 months (WorkBC, 2014).

The government of Newfoundland and Labrador, similar to other less populated provinces, relies on the federal government programs for displaced workers. The federal TIOW program is a prominent feature of the province's employability efforts. Once again, the range of non-EI eligible unemployed persons such as young people, minorities, the disabled, aboriginals, older workers and low skilled employed persons are program targets.

Newfoundland and Labrador has had to deal with relatively sudden and profound unemployment events in the past. By 1992, the once plentiful stocks of Northern Cod had fallen to levels that the fishery was no longer commercially viable. There was a real potential for complete collapse of the industry. The federal government declared a moratorium on fishing Northern Cod on the 2<sup>nd</sup> of July 1992. The history leading up to the federal government's decision is complex involving increased efficiencies in harvesting fish, increased demand, along with the combined fishing activities of other provinces and foreign nations (Hamilton & Butler, 2001; Higgins, 2008).

Large numbers of Newfoundland fishery and allied workers were impacted by the Northern Cod moratorium. Facing the potential of serious adverse social consequences caused by idle workers, the federal government enacted the Northern Cod Adjustment and Recovery Program (NCARP). This was followed by the The Atlantic Groundfish Strategy (TAGS) in 1994. In total, over \$3.1 billion was expended to retraining displaced workers and other restructuring adjustments (Hamilton & Butler, 2001). These programs required the displaced workers to retrain for other types of work in order to receive other forms of financial assistance (Hamilton & Butler, 2001; Higgins, 2008).

Training the displaced workers received under the NCARP and TAGS programs ranged from literacy training, adult basic education, entrepreneurship, and post-secondary studies (Higgins, 2008). William E. Schrank (2004), professor of economics at Memorial University of Newfoundland, investigated the outcomes of the Northern Cod moratorium on the Newfoundland fishery and its economy. Schrank's investigation looked for measurable changes that had occurred from 1992 to 2002. At the time of Schrank report, the moratorium resulted in the largest mass layoff in Canadian history, yet the number of full time fishers was at the same level on 2002 as it had been in 1992. The number of fish plant workers had only slightly declined. Approximately 11% of the labour force was directly involved with the fishery as either fishers or fish plant workers. In terms of the retraining efforts, Schrank stated,

The adjustment programs proved troublesome. I am unaware of any study that relates the experiences of the former fishermen and fish plant workers in retraining programs to their future employment. Anecdotally, I

was witness to fishermen with a high school education (rare enough) being forced into the university “for retraining” in order to keep their income maintenance payments. Regardless of their attitude, and some were very enthusiastic, they were grossly unprepared either to enter or return to an academic environment (after perhaps twenty years in the labor force) and many never completed their program. (p. 412)

This experience strongly suggests that adjustment programs for unemployed workers, specifically those related to further learning, need to be properly designed and older adults prepared (academically upgraded) in order to return to formal education and be successful. The programs need monitoring, the outcomes evaluated, and modifications made when necessary.

Ontario targets the same unemployed and under-employed groups as the other provinces through federal-provincial agreements. Additionally, the Ontario government, via its Ministry of Training, Colleges and Universities (OMTCU), funded and implemented the Second Career Program to reskill displaced workers in June of 2008 (National Adult Literacy Data Base, n.d.; OMTCU, 2013).

### **The Ontario Second Career Program**

Experiencing similar economic circumstances which had led to the federal and provincial worker reskilling initiatives described above, Ontario was prompted to address the additional layoffs and large numbers of inappropriately skilled workers in a more focused manner. The Ontario Second Career program was designed to assist workers

displaced by business reorganizations and closures that resulted in permanent lay-offs. The Second Career program has a points-based series of qualifying criteria for each applicant (Gail Derrington, personal communication, March 11, 2013; Miner, 2010; OMTCU, 2012).

To accumulate the most qualifying points for the program, the individual would have to have been in their last position for seven years, be unemployed and actively seeking employment for a specified time. The individual has to have identified a high demand career area, and lack the skills to secure an in-demand position within that career area. Additional qualifying criteria are that the applicant must demonstrate engagement in an unproductive active job search, be unemployed for minimum period, have a defined requirement for specific new skills, and meet program requirements for financial need. The subsidized retraining available is restricted to high demand jobs, and the education/training program objective to improve the worker's employability has to be achievable. An existing post-secondary program for the desired career must provide the necessary education to increase the Second Career applicant's employability (Gail Derrington, personal communication, March 11, 2013; OMTCU, 2012).

A 2010 first quarter review indicated that two-thirds of the Second Career Program graduates had found employment within three months (Colleges Ontario, 2010). The Ontario government stated, since inception, more than 65,000 displaced workers have received funding through Second Career with 81 per cent securing employment within a year (Government of Ontario, 2014).

Recalling Miner's (2010) report that stated the Second Career program will face future challenges with more displaced workers in need of reskilling. How well prospective students prepared for post-secondary performance, in terms of literacy or numeracy is unknown, and a range of upgrading efforts may be necessary. Second Career is only part of a larger solution as, on its own, it will not be sufficient to resolve all the future retraining needs. Ontario will need to train or retrain 1.73 million people by 2026. This translates to an annual number of more than 78,000 prospective adult post-secondary graduates. Currently, this is over six times the program's capability (Miner, 2010).

There was a flood of enrollees in the first phases of the Second Career program. The Ontario Ministry of Training, Colleges and Universities endeavoured to make the program more manageable by instituting the points based eligibility requirements. Those with the greatest financial need are given priority for acceptance in the program (Gail Derrington, personal communication, March 11, 2013).

## **Education and Adults in Midlife**

Today's mid-life adults, the 40 to 65 age group, are Canada's most educated generation to date (HRSDC, 2006). For many adults currently in mid-life, education has been a significant part of their formative years and often continues to be highly valued throughout their adult lives. In general, adults in mid-life are inclined to re-evaluate their life assumptions, beliefs, and contemplate new creative activities. They are taking time to chart a new life course that can include further education as a means to achieve specific objectives (Sheehy, 1995; Staudinger & Black, 2001). In the case of Second Career program participants; this natural process of re-evaluation may have been suddenly accelerated by job displacement and resultant financial need.

Mendelsohn (2006), reporting on a Chadwick Martin Bailey research study published in 2006, stated the population of mid-life adults studied characterise themselves as status seekers (26%), politically and socially active (17%), and achievers (16%). In the achiever segment, 24% classified themselves as early adopters of technology.

The Chadwick Martin Bailey study findings suggest that unchallenging careers and lifestyles would not appeal to a significant number of mid-life adults. In fact, many of today's mid-life adults are contemplating or are voluntarily in the process of changing careers. They are adopting challenging leisure activities. Mid-life adults are redesigning their concept of a future retirement to one that involves continued work (full or part time), or a variety of new activities (Mendelsohn, 2006; Merrill, 2007; Sheehy, 1995).

Formal and informal learning often figures prominently in achieving the mid-life adult's new goals (Sheehy, 1995).

Neugarten (1978, as cited by Staudinger & Black, 2001) stated that mid-life is a time for reassessment and transition. In mid-life, one re-evaluates one's roles, the meaningfulness of long held assumptions and life choices. Mid-life often raises the desire for new challenges and renewed emphasis on creative activities. This brings about new definitions of fulfillment and new motivations. These changes have new forms of stress attached to them. Within these emerging interests, the mid-life adult must balance on-going life responsibilities with the new objectives.

The mid-life learner's vision of retirement may be directed toward active volunteerism in cultural, political, or community activities, which might require refreshed skills, or a need to acquire new ones. Unforeseen events, such as a reduction of financial status, may have negatively impacted the carefully planned journey to retirement, derailing it, and a new bridging career became a sudden requirement. Necessity abruptly becomes part of the motivation set rather than enrichment learning (Mendelsohn, 2006; Merrill, 2007; Sheehy, 1995). This is the case for many Second Career learners who may have at one time believed their positions would be secure until retirement. With little or no warning, these older adults found themselves without an income. They unhappily realized they possessed limited or no employment prospects that would utilize their current meagre skills while they still have many years of active life yet to live.

The decision to accept the challenge of further education may have arisen from the mid-life adult's core values, all forms of successful prior learning, as part of a lifetime of experience, or a combination of these factors. As Knowles, Holton and Swanson (2005) averred, human behaviour is goal oriented and to make progress toward goals requires planned objectives. Clearly stated personal objectives create motivation (Knowles, Holton, & Swanson, 2005). Learning satisfies the mid-life adult's current need to solve problems, as it has done throughout life. Continually emerging needs arise from new experiences as well as from all other forms of learning. Additional emergent needs are generated from and are built upon a foundation of prior learning experiences. Additional learning stimulates new interests and more needs develop as a result (Knowles et al., 2005). The mid-life adult's decision to return to further education can come easily because of prior learning success, but that does not mean the decision may have been made casually.

### **Learning Opportunities**

There are an increasing number of learning opportunities available for those in mid-life and beyond. Some of these formal and non-formal learning opportunities are expansions of existing programs and others are new. The following represents only a small sample.

Ryerson University's G. Raymond Chang School of Continuing Education, Toronto, offers on-campus evening courses and online distance education in 1,475 courses, seminars, and workshops. There are workshops, lectures, and courses



specifically for those 50 years and older. These 50+ programs are promoted to those who wish to redefine retirement and become an actively engaged learner. Many of the learning opportunities are focused on the fine arts and community service volunteerism. Other courses and programs are offered to prepare for post-secondary admission, academic bridging, or are designed specifically for a career change (Ryerson University, 2011). The university website indicates a liberal admissions policy by stating that, “[t]he Chang School provides access to university-level and degree-credit courses for all adult learners, regardless of previous experience” (Ryerson University, 2012, para. 1). Ryerson University does not specifically direct its information toward Second Career learners, but a website search for career-oriented learning brings one to the above information<sup>13</sup>.

Toronto’s Humber College (2012) website repeats the Ontario government information on the Second Career program. On the web page, there are links to the government website, Humber courses and programs and other information useful for prospective students.

Similarly, the Toronto’s George Brown College website repeats Ontario government Second Career program information. Additionally, the page information has more content and the links bring one to noticeably more pertinent information than the Humber College site (George Brown College, 2012).

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<sup>13</sup> There is a link to an article on the Ryerson University site which includes the Chang School, among others, in discussing the Second Career program (see: [http://ce-online.ryerson.ca/ce/content/program\\_area/-landscape/Edmonton\\_Journal\\_062009\\_Karen\\_Aiken.pdf](http://ce-online.ryerson.ca/ce/content/program_area/-landscape/Edmonton_Journal_062009_Karen_Aiken.pdf) )

Kingston, Ontario's St. Lawrence College (2012) has a rather detailed single web page listing the Second Career qualifying criteria, part-time work restrictions, brief employer satisfaction statements regarding graduates, and links to the college's offerings. A drawback of St. Lawrence College's web page is that a prospective learner might assume all the college's offerings would qualify for Second Career support. This would not be the case. The web page does indicate the college's employment centre would provide advice on program selection.

London, Ontario's Fanshawe College's (2012) website contains the most information, of this small sampling, on Second Career oriented offerings. In addition to links to Second Career participation criteria, college courses and programs, there is a two-minute video of students discussing their reasons for being in Second Career. Fanshawe College Second Career students relate their motivations for course selection, and their employment aspirations in video clips.

### **Distance Education**

Distance Education continues to expand worldwide and offers convenience thus adding breadth to the available learning opportunities for the mature adult. Distance Education (DE) addresses the student's desire to pursue further education by reducing or eliminating the need to be at a specific location at a given time (Galusha, 1997). Given the previously mentioned active lifestyle trends reported by Sheehy (1995) and Merrill (2007), mature adults may not wish to compromise their social activities or other responsibilities to attend classes on a regular basis. In general, DE students tend to be

older than traditional campus-based learners. The convenience aspect might explain much of the popularity of DE with older learners. The 40 to 65 age group has been specifically credited with pushing up the average age of DE students (Deka & McMurry, 2006). An additional factor attracting mature adults to this form of learning might be the anonymity that DE affords. No one need know that the mid-life learner is one of the oldest, if not the oldest, person in the class. Similarly, the youth of their classmates is unknown. Anonymity makes everyone just a fellow student known only by their communications and scholarship. It could be said that DE is a social equalizer.

### **Massive Open Online Courses**

A recent development in distance education has been the appearance of massive open online courses (MOOCs). Newly formed organizations, both private and university collaborations, began offering these non-credit, short duration courses. A nominal enrolment fee is charged for each course. The courses range from leisure interest subjects to more challenging university level topics. As many of these MOOC providers, e.g. Coursera, edX, and Udacity, began offering courses in 2012 and research apparently has not yet been undertaken. It is too early to determine how attractive or beneficial these courses would be to midlife adults. However, enrolment figures published in the popular press suggest widespread interest in MOOCs has already been generated (Lewin, 2012; McAuley, Stewart, Siemens, & Cormier, 2010; Pappano, 2012).

## **Barriers to Learning**

Once the mature adult has selected and made a commitment to a post-secondary program, as a means to improve their employability, the reality of that choice will arrive in various forms as the further education plan is implemented. The mid-life adult learner will encounter obstacles, be they major or minor, no matter which program of study option is exercised. Family, friends, post-secondary institution advisors, or the individual themselves, may anticipate some of the inhibiting factors. There will be unexpected difficulties that develop over time or suddenly arise. A wide variety of education barrier categories are described in the literature. A barrier can be defined as a factor that prevents, limits, or delays participation in the desired form of education (Silva, Cahalan, & Lacireno-Paquet, 1998). The types of barriers confronting the prospective mid-life learner include non-helpful pre-conceived ideas, faulty perceptions, inappropriate motivations, situational factors, technology, and the influence of negative societal beliefs (Neugarten, 1978 as cited by Staudinger & Black, 2001).

Three classifications of barriers encountered by mature learners were described in a study published by AARP<sup>14</sup> (2000, as cited by American Council on Education, 2007). Attitudinal, demographic, and structural barriers are the areas that can inhibit or block progress on the path of lifelong learning. Each person has their own unique mix of barriers and each component of the mix has its own level of intensity. The three types of barriers do not have distinct boundaries. They are interrelated in varying degrees depending on the individual.

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<sup>14</sup> The previous name of AARP was *American Association of Retired Persons*. The older name is no longer used, see <http://www.aarp.org/>

## **Attitudinal Barriers**

The types of attitudinal barriers prospective mid-life learners may face include negative perceptions of themselves, weak positive motivators, reactions to situational factors, technology concerns, and age-related societal myths. Firm resolve, good motivation, and a positive attitude will be required to engage and continue in formal education (Merrill, 2007; Sheehy, 1995; Thompson & Foth, 2003). In order to overcome these barriers, new strategies will need to be developed and acted upon for the midlife learner to achieve their objectives (Staudinger & Black, 2001).

## **Negative Perceptions**

Myths and stereotypes evolve from assumptions that are accepted with little or no proof. They can arise when the characteristics of a small segment of a group, however a group is defined, are applied to the whole group or organization. These perceptions could be accurate, exaggerated, or completely false. Problems develop when people outside the group act on those assumptions to the detriment of the negatively labelled group. Perhaps, the worst case occurs when those inside the group believe the myths and act in a manner that apparently validates the myth. Those individuals can limit themselves as much or more than those who exercise prejudice against them (Carter, Bishop, Kravits, & Maurin, 2007; Charles, Fischer, Massey, & Mooney, 2009).

North American society, in particular, is said to be youth oriented. The youth standard, typified by those in their twenties and thirties, is held up as the ideal. The implied message is that once a person passes the age of 40 they are no longer young. The

suggestion is that if mid-life adults, those over 40, attempt to conform to society's youth oriented criteria then disillusionment, disappointment, or at a minimum embarrassment, will soon follow. If mid-life adults accept the over 40-age myth, they can restrict their activities prematurely thereby reducing their potential quality of life. An associated societal message is that if one has made the right choices, then the reward for reaching mid-life is a quiet and stable existence with nothing of significance left to achieve (Van Hoose, 1985).

Crawford (2004) stated there have been those in society that have considered the quest for learning by mature adults, specifically those over 50, as self-centered, unnecessary, biologically restricted, and without redeeming societal value given the realities of what remains of finite lifespans. Although the complex and numerous age-related and environmental factors have an influence on the mature adult's ability to learn, the popular belief that learning ability must, of necessity, decline with age persists (Crawford, 2004).

The popular misconception is that with aging comes an unavoidable decline in learning ability bringing with it diminished productivity. This is in part based on the belief that age-related delayed retrieval or loss of information from memory is an indication of reduced cognitive ability. Individuals having the negative self-image as an older person with diminished learning capabilities are limiting the variety and difficulty of challenges they may undertake. This belief in age-related decline in cognitive abilities persists in the face of mounting evidence that mature adults can make better learners due to their large store of foundational knowledge, experiences, and broader perspectives

(Queensland Government, 2012). The facts that mature adults continue throughout life to solve daily problems, learn from experience, and are even keen to have new challenges are casually ignored (Crawford, 2004; Queensland Government, 2012).

Schaie (1994) conducted a longitudinal study, which spanned decades, which found that cognitive abilities increased to approximately age forty, then stabilize until age sixty and modestly declined thereafter. The reduction in cognitive abilities for those past their mid-seventies was then detectably lower than those in their twenties. The study findings also revealed that with appropriate learning interventions the diminished cognitive ability experienced by some of the participants could be reversed to pre-study levels (Schaie, 1994).

Internal attitudinal barriers can take many forms, not just the age-related doubts about learning ability. The older learner may not relish the prospect of feeling out of place as the oldest person in the class (including the teacher). They may feel intimidated by their apparently technology savvy younger colleagues. These realities may only be fully confronted and appreciated after enrolment. This realisation can prove to be quite challenging in its own right (American Council on Education, 2007). (As discussed earlier, the anonymity distance education provides is a solution to cancel the prospect of obviously being the classroom elder statesperson (Galusha, 1997).

## Negative Emotions

The United States Office of Educational Research and Improvement contracted Mathematica Policy Research, Inc. (hereafter: “Mathematica”) to analyse a large number of reports on mid-lifers produced annually by the U. S. National Center for Education Statistics. The project objectives included the preservation of existing data and its conversion into formats that would facilitate dissemination and use. The documents studied covered a wide variety of formal education situations. A key objective was to identify factors that promote or inhibit adult education program participation<sup>15</sup> (Silva et al., 1998).

An analysis of the Mathematica study results revealed that responses for those in the first portion of the mid-life range (40-55 years) listed ‘fear’ as the main reason to not participate in further education (Silva et al., 1998). The assumption made for this research study is that the U. S. findings are generally similar to those that would be found if comparable research would be conducted in Canada.

The material extracted and analysed from the respondents’ answers to Mathematica’s questions suggest that among mid-lifers there are widespread self-doubts concerning their academic capabilities being a match for the challenge of higher education. The long absence from studies was cited as a major concern for midlife adults when they considered returning to formal education. These long absence concerns and

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<sup>15</sup> The Mathematica report authors do not claim that this information is fully complete as the report was developed from a sample of the documents available at the U. S. Office of Educational Research and Improvement (Silva et al, 1998).



fear-based responses are viewed as significant barriers to adult education participation (Silva et al., 1998).

If there are sufficiently strong external factors to override the internal negative ideas, fears, and concerns, such as is the case with laid-off workers, the mid-life adult may then decide to take on the challenges of further education. It is the absence of strong motivators that represents the learning barrier (Ferguson, 2005; Zemke & Zemke, 1984).

### **Situational Barriers**

Situational barriers involving responsibilities and commitments are related to family matters, current career commitments, and outside interests that compete for the individual's available time are all barriers to further education (Rubenson, 2001). Family responsibilities include elder care and childcare. The possibility of delayed parenthood can mean a 40+ adult can still be caring for pre-teen or teenaged children (Bushnik & Garner, 2008; Cranswick & Dosman, 2007). Children, depending on their ages, present a variety of issues that need to be resolved if the mid-life learner is to be successful in their studies. The full constellation of some participant circumstances may only permit further education after children have grown or are on the verge of leaving home.

The general trend in Canada is toward an aging population. People live longer. Mid-life adults are quite often caring, to some degree, for at least one elderly parent. Eldercare is often physically and emotionally draining<sup>16</sup>. As the average age of Second

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<sup>16</sup> A scan of post-secondary institution websites list eldercare, among other factors, as an issue for learners with little more than a mild warning time and resources management will be required. Only the standard support services available to younger students are offered (e.g., see: <http://www.utgsu.ca/student-issues/family-issues/>)

Career students is older than traditional students, issues such as eldercare and associated financial obligations can represent barriers the younger students may not encounter. Today's mid-life adult will become the next mid-life generation's elder parent. Current projections indicate the older, non-traditional student trend will continue well past the year 2050 (Chan et al., 2011; Cranswick & Dosman, 2007; University of Western Ontario, 2011).

The existing interests of the potential mid-life learner may include a high level of commitment and associated responsibilities. An example of these types of commitments would be an office holder of a community organization, church committee, or a social club. The mid-life adult may have to end or significantly alter their involvement in these desired but conflicting activities. If the mid-life learner cannot or will not disengage or alter the conflicting commitment, further education may not be successful or will not be possible. These conflicting interests will represent an effective barrier as long as they are in place.

Responsibilities and commitments related to family matters, career, and outside interests that compete for the individual's available time comprise major situational barriers to further education (Rubenson, 2001). Family responsibilities involving children present a variety of issues related to the children's ages and their activities that need to be resolved if the mid-life learner is to be successful. If there are young children to care for, there may have to be significant lifestyles changes for the learner, and the learner's family or friends, to make formal learning possible. The solutions are unique to each situation. If the decision is made to proceed toward formal education, there will be

planning, scheduling, and continuing adjustments to routines that will affect all concerned. All individuals affected by the mid-life learner's new activities will have to understand the reasons for the changes, their importance, the level of commitment required, and what the likely impact will be on everyone's lives (Rubenson, 2001; Streich, 2009).

In the case of single parents, or where both parents work outside the home, there may be members of the extended family, friends, or paid helpers that are part of the new strategies. For all who may be affected, contingency plans for frustrated arrangements will need to be prepared and in place (Streich, 2009). The learners will need quiet time, access to the computer, another computer, or relief from regular duties in order to pursue their studies. This will be true whether the studies are in a traditional setting, or at a distance. Special consideration is needed for the distance learner as they will be present in the home and others will assume that they are available to engage in regular domestic activities (Cookson, 1990; Galusha, 1997; Streich, 2009).

### **Institutional Interactions**

Contributing to external attitudinal and structural barriers may be the mature adult's reactions to the policies, practices, and services of post-secondary institutions. As the bulk of the services provided are oriented toward younger learners' issues, those services may not be sufficiently flexible or available at convenient times to accommodate older learner's needs. Younger support staff may assume the mature adult to be more

experienced than they are in navigating the post-secondary administrative labyrinth therefore automatically familiar with policies, practices, and services of the institution. The mature learner may actually be lost having no idea where to turn to get the type of help they need (American Council on Education, 2007).

## **Digital Divide**

The term Digital Divide has uncertain origins but appears to have come into being in the mid-1990's, coincident with widespread public access to the Internet. There has been long-term recognition that the access to information via computer technology would result in those who are able to retrieve the needed information and those that were de facto barred from access due to the lack of the appropriate skills (Leiner, Cerf, Clark, Kahn, Kleinrock, Lynch, & Wolfe, 2012; McConnaughey, Nila, & Sloan, 1995; Rappaport, 2009).

Prensky (2011) defined digital natives as those who grow up never knowing the time when there was no Internet and personal computer technology. Digital natives have different technical abilities, a technology oriented language, and a different way of thinking because they have always inhabited a digital world unlike digital immigrants.

Digital immigrants are those who adopted, hence had to learn, the new technologies. By definition, digital immigrants are older, speak a different language, and have different thought processes than digital natives. Like other newcomers to any culture, digital immigrants can display varying degrees of facility in navigating their new

environment (Prensky, 2011). Those in mid-life are, in the best case, able digital immigrants.

Potential mid-life learners may lack of access to, or lack of understanding of modern information and communications technology (ICT). Other midlife adults may have adequate to high ICT skill levels. This sorts individuals into two groups separated by technology thus creating a subcategory of the previously described Digital Divide. These individual groups have been referred into "haves and have-nots . . . knowers and know-nots . . . (Rozner, 1998, p 1)." Access is defined here as the availability of ICT equipment, i.e., the use of a computer with Internet capability, and the knowledge to adequately employ that technology.

Statistics Canada (2008a: 2008b) has conducted surveys and reported on Internet usage for some time. By inference, Internet usage relates to the availability of hardware and knowledge to use ICT. The 2007 survey results once again indicated the persistent existence of the digital divide amongst distinct groups of Canadians. These groups were defined by income, education, and age. Age was cited as an important factor for Internet usage with 96% of the 16 to 24 year old age group going online and usage declining to 29% of those 65 and older (Statistics Canada, 2008a). The breakdown in ages indicates that Internet usage declines across age groups and is essentially linear for both males and females (Statistics Canada, 2008a).

Popular media and scholarly articles have clearly stated that a digital divide separates those that have access and are technology savvy from the have-nots. The

digital gap was significant and age related. Older adults were less technology savvy hence less adept with information and communications technology (ICT) and the Internet than younger people (Sciadas, 2002). Post-secondary ICT based learning environments typically use learning management systems, the Internet for communication, and a wide variety of administrative purposes (Lopes, 2008). Once the classes begin, the adequacy or inadequacy of ICT skills, or equipment operation capabilities, of the mid-life learner can rapidly become apparent.

It was not that long ago that the digital divide was frequently discussed in the literature as an impediment to education and career possibilities. However, the digital divide may be a barrier of diminishing concern. There are mounting reports that mature adults, even individuals of quite advanced years, are becoming technology competent thus reducing the size, importance, and types of concerns related to the digital divide (Bullen, 2008; Ford, & Ford, 2009; Koller, Harvey, & Magnotta, 2001; Marano, & Ingram, 2012).

Hawkins and Oblinger (2006) argue that the digital divide has almost disappeared through growing and widespread access to hardware and broadband services. Workplaces and learning institutions provide technology access and training for adults. Statistics Canada (2008a) reports 19.2 million Canadians were online during their 2007 survey. This represented a two-thirds increase over the 2005 survey (Statistics Canada, 2008b).

Coppola, Drury, Thomas, and Wexler (2010) stated that in recent years midlife adults have made significant gains with using information and communication technology for both leisure and practical purposes. As individuals age, there are those that experience reduced visual acuity, and increasing motor skill challenges (e.g., arthritis in the lower arm) that interfere with short or longer-term computer use. Coppola et al. (2010) stated that although research supports that a wide range of benefits would accrue to older adults, even with recreational computer use, there can be a reluctance or inability to sit in front of the computer monitor long enough to perfect their skills.

There is no doubt a wide range of information technology competence and equipment quality exists within the midlife generation. Any given individual may not have the skills to efficiently and effectively deal with technology related problems. The hardware and software owned by a given mid-lifer may be on the borderline to cope with the needs of their learning workload. The older adults may be reluctant to upgrade their existing hardware or software as it may strain their limited budget (Bullen, 2008; Flaherty, 2010; Rozner, 1998).

In cases where a midlife adult resists keeping reasonable pace with technology changes, the digital divide can arise. As the technology advances, the individual may elect to persist with older equipment or remain at an unchanged skills level. Making additional trips to the post-secondary institution, or remain there for long periods, to use the up to date technology may generate personalized learning barriers.

## Motivation

Cohn and Taylor (2010), reporting on findings of PEW<sup>17</sup> research studies, stated that those aged 45 to 65 years of age were more pessimistic than other age groups, even more so than those 65+ about various aspects of their lives and accomplishments or lack thereof. Typically, people at this stage of their life cycle find their lives demanding and stressful. It is not that these individuals see themselves as old. In their minds, old age will not begin until they are in their 70s (Cohn & Taylor, 2010). However, midlife pessimism is unusual or a new phenomenon. Diller (2011) stated, “[r]eaching midlife has traditionally been met with this sort of pessimism” (para 2). At some point in early midlife, an individual sees their life trajectory taking an inevitable downhill turn. These negative thoughts may be reinforced by society with its youth orientation (Diller, 2011). It would be against a possible backdrop of negative feelings that those faced with involuntary career change would have to rally overriding positive motivation to return to formal education.

A potential mid-life learner may undervalue their skills and abilities, and have negative perceptions of self. They may fear that they do not have sufficient formal background education, the necessary prior experiences to build upon, and thus continue to believe that successful learning is not possible (Ferguson, 2005; Zemke & Zemke, 1984). These fear based issues can demotivate an individual. Fears and negative

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<sup>17</sup> The Pew Research Center is a non-partisan U.S. organization based in Washington, D.C. that conducts research on a variety of topics, such as politics, social trends, media, and technology. Their research typically draws from U.S. sources. See: [PewResearch.org](http://PewResearch.org)



perceptions need to be countered with confidence building factors such as positive self-talk and support network encouragement (Carter et al., 2007).

A mid-life adult's positive motives in making the voluntary decision to return to formal education can be complex. The mid-life adult motivation strategies can change with changes in the external environment as well as shifts in internal needs. The operative motive priorities can change over time, some may cease to be important, and motives can emerge as dominant among the others. Mid-life learners closer to 40 years of age are likely to have different priorities (e.g., current financial concerns) than older mid-lifers (e.g., financial stable therefore more enrichment oriented) (Ferguson, 2005; Zemke & Zemke, 1984).

Voluntary and involuntary job changers' career-oriented drivers to pursue further education include, 1) the belief there will be performance improvement in the current position with new skills acquisition, 2) upgrading skills or reskilling for a career change, 3) the perception that further advancement with the current employer is not possible without more education, and 4) unexpected advancement now demands that new skills be acquired (Ferguson, 2005).

Career oriented drivers for voluntary career changers in the second half of mid-life generally have a lower priority than those in the first half. Visions of active productive retirement may become prominent in the older adult's thoughts. Some of these retirement planning ideas generate needs and motivations that have education-focused implications. These drivers include: 1) preparation for continued work in semi-

retirement, 2) future volunteer work, and 3) future social or political activities (CLC, 2006; McNair, 2012).

### **Age Related Mental Barrier Myth versus Reality**

After centuries of discussion, scientific inquiry and debate, a widely agreed upon definition of intelligence has remained elusive (Appleyard, 1999; Richardson, 1999). Richardson (1999) stated that throughout time the concept of intelligence has been found in all societies. Various manifestations of intelligence have been described in numerous ways and yet we are left with considerable uncertainty as to what intelligence is (Richardson, 1999). Thus, intelligence is a widely accepted concept but its definition and methods of measurement are endlessly debated and criticized (Gardner, 1993:1999; Gould, 1996; Indiana University, 2007).

The late 1800s and into the early 20<sup>th</sup> Century saw the beginnings of learning theories brought about by investigations on how the mind works and brain function. Learned and often repeated behaviours were determined to reflect physical changes in the brain. It was discovered that the thinking area of the brain, the cortex, changed over time with changes in use, i.e., the occurrence of learning (Schwartz & Begley, 2002). The science of neuroplasticity, the plastic nature of brain due to specific use, was born. Schwartz and Begley (2002) stated, “[n]europlasticity refers to the ability of neurons to forge new connections, to blaze new paths through the cortex, even assume new roles” (p. 15).

At first, much of the science of neuroplasticity was hypothetical with minimal evidence. The lack of evidence propelled work to try to understand how nerves and the brain functioned. The 20<sup>th</sup> Century marched on, misconceptions and prejudices about mind and brain function declined and science based evidence increased, at least at the biological level (Gould, 1996; Schwartz & Begley, 2002).

For some time, science had known that mental processes were the result of the interaction of interconnected brain cells called neurons. The next question to be answered involved determining to what degree the mental processes (the mind) are separate from the physical brain. To use the language of computer technology, the brain is the hardware and the mind is the software. Mental activity has been shown influence the physical and physical influences the mental capabilities (Schwartz & Begley, 2002; Kandel, 2006).

Nobel laureate Eric Kandel and his colleagues, working with animals, identified neural circuits and how they changed in response to stimuli (i.e., the process of learning). They found that through learning modifications of the brain's physical structure represented enduring changes. New neural connections were made and existing ones were strengthened. Kandel and his colleagues had found a biological, molecular level basis for learning and memory (Schwartz & Begley, 2002; Kandel, 2006).

The learning abilities, in the context of neuroplasticity, of children and young adults are considerable and easily recognized. Albeit this neuroplasticity is often overestimated. As an example, the adult's popular perception of the brief timeframe

required for a young child to learn language. In fact, a child's language acquisition takes years to achieve an acceptable level of proficiency (Cruz-Ferreira, 2011; Richardson, 1999; Schwartz & Begley, 2002). A two-year-old child's ability to say "No!" is communication but lacks high language development (Cruz-Ferreira, 2011).

Modern brain imaging techniques displays physical changes related to neural activity when the brain is being used for specific purposes. Studies have shown that cello players, as an example, had areas of the brain for the left hand fingering of the strings that were more developed than similar areas in non-cello players. Interestingly, the right hand, that only bows the strings, showed no more development than non-cello players. Cab drivers in London, England must pass a detailed licensing test of their knowledge of the city. The mental map location is more developed in the cab driver's brain than the average person. Many of the cab drivers learned their craft as late adolescents and young adults (Richardson, 1999; Schwartz & Begley, 2002)<sup>18</sup>.

The current research suggests the brain retains its malleability<sup>19</sup> and learning capacity throughout life barring any physically damaging trauma or pathology. New therapies using the power of the mind to treat stroke victims, a variety of mental disorders, stress, and other issues have produced surprising benefits by reducing or eliminating the debilitating symptoms. These improvements have occurred through volitional means, essentially the use of learning to mitigate neurological problems and disabilities. There are cases of these benefits being realized well into adulthood

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<sup>18</sup> The cello players and cab drivers examples frequently appear in popular and academic articles on brain modifications due to the acquisition of specific skills. The authors cited are only three among many.

<sup>19</sup> Malleability: i.e., the brain's ability to modify existing locations and neural circuits for new purposes (Schwartz & Begley, 2002).

(Ramachandran, 2011; Schwartz & Begley, 2002). If the damaged brain can relearn valuable functions, then the intact brain can continue to learn through formal and informal means. Kandel (2006) stated that when one had finished reading his book (*In Search of Memory*), the reader's brain, any reader's brain, would be physically different thus implying age was not an inhibiting learning factor as the brain retains its neuroplasticity.

In the context of the previous discussion on the digital divide<sup>20</sup>, Small and Vorgan (2011) reported on magnetic resonance imaging (MRI) experimental results on digital natives versus participants who were digitally naïve. The digitally naïve group tested were over the age of 50 (55 to 76 years of age). Although the study was limited (a total of 24 participants), the results, which may stimulate others to further research, suggest that the over 50 group's alterations in mental pathways, decision-making, and responsiveness to Internet based challenges allowed them to quickly catch up to the level of their digitally savvy co-participants (Small, Moody, Siddarth, Bookheimer, 2009; Small & Vorgan, 2011).

Robert J. Sternberg's (Indiana University, 2007) Triarchic Theory of intelligence describes three thinking processes involved in learning and problem-solving for life success. The Triarchic Theory is composed of: 1) analytical thinking, 2) practical thinking, and 3) creative thinking. With the proper effort, the individual can develop each of these mental processes further. As a person ages the forms of intelligence

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<sup>20</sup> pp. 43-47

change, therefore, the learning strategies should also change, but learning can continue (Carter et al., 2007; Indiana University, 2007; Schwartz, & Begley, 2002).

Acquisition of experiential knowledge occurs in ways and under circumstances that people often do not recognize as learning, or discount as unimportant. The new learning could be a tip or a short cut on baking a cake or repairing a lawn mower. Since the new knowledge presents a small portion of existing knowledge, it could be considered mundane or trivial. The knowledge gained is not judged as learning even though it is truly learning if the acquired information has changed behaviour. Future actions can be different as result of the use of that newly acquired knowledge (Driscoll, 2005).

### **Successful Strategies and Actions**

A variety of strategies are developed and implemented by adults to overcome the wide array of problems and obstacles arising in the normal flow of life events. A midlife adult returning to post-secondary education will invariably experience the need to make adjustments to deal with conflicting factors that affect their new role as student. Firm resolve, good motivation and a positive attitude were required to engage and continue in formal education to realise the desired objectives (Merrill, 2007; Sheehy, 1995; Thompson & Foth, 2003).

For the mature adult, whether in the Second Career Program or not, many barriers could be similar to those encountered by other younger learners. Institutional support services may be quite adequate to assist the mid-life learner with most of the issues encountered. Unique situational factors, such as eldercare, may not be experienced by

their younger colleagues. Resolution of a specific problem may be left solely to the mature adult as it is beyond the capabilities of the institution (Keith, 2007; Lieb, 1991; Mbilinyi, 2006; Ontario Undergraduate Student Alliance [OUSA], 2011).

Questions arise as to what types of barriers are more acute for mid-life learners; those that represented little difficulty, and what were the strategies employed to overcome those barriers. Driving the decision to engage in further learning may have been one set of clear motivations. Once obstacles were encountered, decisions as to what new or altered motivations, or positive self-talk, are needed to persist and complete (Carter et al., 2007). A portion of this research seeks to identify the ameliorating actions that were chosen by the mid-life learners.

## **Summary of Chapter 2**

The need for Canadian businesses to be globally competitive and the worldwide financial crisis of late 2008 increased the existing demand for higher skilled workers. The economic disruption created by the 2008/2009 recession caused many businesses to either trim down or terminate their operations. Partnerships were formed between the Canadian federal and provincial governments that resulted in initiatives to reskill workers through post-secondary institution courses and programs. The intent of the additional education was to enhance the employability of displaced workers for jobs in demand areas.

For the current mid-life adults, defined as the 40 to 65 year old age group, education has been a significant part of their formative years and into their adulthood. This makes them the most educated generation to their time. Education is perceived by the mid-life adult as a means to increase employability, advance their careers, and enrich their lives. Many mid-life adults are re-evaluating their life assumptions and beliefs, contemplating new creative activities to chart a new life course (HRSDC, 2006; Sheehy, 1995; Staudinger & Black, 2001). The mid-life voluntary career changer's vision of retirement might be directed toward getting active in volunteerism, cultural, political, or community activities that might require refreshed skills, or a need to acquire new ones.

In Ontario, the recent economic turmoil added to the long-standing pattern of business reorganizations and closures. What workers thought of as secure jobs suddenly evaporated. Frequently, the displaced workers had skills the employment marketplace no longer needed. These unforeseen events impacted the midlife adult's planned journey to retirement, derailing it, and a new bridging career became a sudden requirement. In June of 2008, the Ontario government established the Second Career Program that was to assist displaced workers to gain new skills to improve their employability deficiencies (Liaison College Brampton News, 2011; National Adult Literacy Data Base, n.d.; OMTCU, 2013).

Various forms of formal and informal learning exist at colleges and universities that voluntary and involuntary career changers may undertake. Many of these adult learning opportunities that may have been engaged in for personal enrichment reasons or to supplement career-oriented objectives are now considered for new purposes. The



subsidized retraining available in Ontario's Second Career Program is restricted to high demand jobs with the objective to get people back to work as quickly as possible (Government of Ontario, 2014; OMTCU, 2013).

Whether the individual is a voluntary and involuntary career changer, the decision to return to studies after a long absence will present various challenges that need to be overcome in order to persist and complete. These challenges (or barriers) can be broadly classified as attitudinal, demographic, or structural barriers. These can slow down progress or block it completely (AARP, 2000, as cited by American Council on Education, 2007).

Attitudinal barriers can be internal or external negative perceptions towards returning to studies at an older age. Negative emotions held might be fear, anxiety, or lack of confidence on personal capabilities. Demographic situational barriers may manifest as child or elder care, restrictive financial circumstances, or local community obligations that are not easily altered or ended.

Structural barriers may arise systemically from the policies, practices, and services of the post-secondary institutions. Navigating through these unfamiliar areas may prove challenging and the results unsatisfying. The technology used by the teachers and learners of today is quite different from what the mature adult used for formal studies in their youth. Computer and Internet skills may need serious upgrading as well as the learner's personal computer system.

The body of research in neuroscience and learning has revealed that, barring disabilities, learning can continue throughout life (Schwartz & Begley, 2002). Various mental processes such as: 1) analytical thinking, 2) practical thinking, and 3) creative thinking can be developed well into old age with the proper effort. As the forms of intelligence change with age, learning strategies should also change (Carter et al., 2007; Indiana University, 2007).

Strong positive motivation will be needed by the midlife adult when they return to formal studies. Voluntary and involuntary changers' career-oriented drivers for further education include the belief that, 1) there will be performance improvement with new skills acquisition, 2) a career change is necessary, 3) the perception that further advancement is not possible without more education, and 4) unexpected advancement demands the acquisition of new skills to ensure productivity and career success (Ferguson, 2005).

A variety of strategies must be developed and implemented by mid-life learners to overcome the barriers encountered upon returning to formal studies. The mature adult has solved a wide array of life problems and obstacles in the past. This history of success needs to be remembered and used to promote positive motivation. Firm resolve, strong motivation, and a positive attitude are required to engage and continue in formal education if the desired outcomes are to be realised (Merrill, 2007; Sheehy, 1995; Thompson & Foth, 2003).

## **Chapter 3: Methodology**

### **Introduction**

This chapter describes the methodology approaches, techniques and participant selection criteria used to design this interpretative, qualitative research study. The purpose of the research is to explore and examine the motivations and barriers encountered by mid-life adults (age 40+) returning to post-secondary education at Centennial College of Applied Arts and Technology (Toronto, Ontario) funded under Ontario's Second Career Program. The Second Career Program has been existence since 2008. To date, there has been virtually no scholarly research on the success of the program or the experiences, persistence strategies and the post-secondary academic success of the returning mature learners. The qualitative data collected through interviews represents the oral descriptions of the participants' thoughts, perceptions, and recollected experiences. These recollections are the impressions, actions and reactions to the situations encountered prior to and during their learning journey.

A total of 16 Second Career Program adult participants<sup>21</sup>, over 40 years of age, were recruited to participate in the research. All the selected participants were either native or long-term Ontario residents. The volunteer participants had quickly responded to e-mail solicitations thus satisfying the sample needs of the research. During the interviews, the participants responded fully and spontaneously to the interview questions.

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<sup>21</sup> These 16 participants represent approximately 10-12% of the enrolled Second Career funded students (Gail Derrington, personal communication, March 11, 2013)

The participants did not display reluctance to respond to any question and gave no sign of manufacturing pleasing answers or confabulating their experiences.

This chapter describes the research approach taken, the sampling, and the data collection methods. The chapter ends by commenting on the potential for researcher bias and counteractive measures. The ethical review process and approvals of both ethics review committees of Memorial University of Newfoundland and Centennial College of Applied Arts and Technology, the later from whom the participants were recruited, are also described. The ethics review requirements of both institutions must be met for research to proceed on human subjects. Those approvals appear in the appendices<sup>22</sup>.

### **Research Approaches in Education**

Education, a social science, has elected to apply natural sciences' research principles and guidelines to explain individual and social behaviour found in various educational contexts. The scientific community has several established approaches to research. The two main research views respected by the scientific community are the quantitative approach and the qualitative approach. The relative merits of these two approaches are part of a continuing, periodically heated, debate. The debate has even spawned a middle group that promotes a mixed approach. The mixed approach, as the name implies, is a combination of quantitative and qualitative elements (Cohen, Manion, & Morrison, 2007; Neuman, 2006). It is sufficient at this point to indicate the researcher has available different methods each with their vocal critics pointing out the shortcomings and equally vocal supporters promoting the merits of a given approach.

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<sup>22</sup> See Appendix 4

The quantitative approach is said to be objective, proceeding deductively, and records data numerically with the aim of validating or invalidating a hypothesis that was chosen prior to the start of the research. The qualitative approach is described as subjective, proceeds inductively, records data with words that, through analysis, results in the formulation of a theory. A theory evolves from the collected data analysis at the end of the research process (Cohen et al., 2007; Neill, 2007; Neuman, 2006).

It is likely that each of these approaches arose and was refined to satisfy different research needs. The quantitative approach is well suited to analysis of the physical world, such as chemical reactions, where controlled experiments yield repeatable numerical results that prove or disprove a hypothesis (Cohen et al., 2007; Neill, 2007; Neuman, 2006). The qualitative approach with its collection of data in words is suitable to the Social Sciences. As people are the subjects of the research, they have varied actions and reactions to situations that are not easily or precisely reduced to numbers. Words, the data as recorded, are capable of expressing various shades of meaning that could be lost in numerical records (Cohen et al., 2007; Neuman, 2006).

Qualitative researchers become part of the context thus involved with the lives and social environment of the participants. Postlethwaite (2005) stated that “[e]thnographic research usually consists of a description of events that occur within the life of a group – with particular reference to the interaction of individuals in the context of the sociocultural norms, rituals, and beliefs shared by the group” (p. 4). As the researcher is immersed in the investigated situation, this acts as a lightning rod for those that insist the loss of objectivity compromises the worth of the findings. Without entering into the

paradigm debate (quantitative vs. qualitative methods), it is reasonable to introduce Harper and Kuh's (2007) proposition that accuracy is achievable even with subjectivity entering into the picture. They stated, "[s]ophisticated statistical analyses can reveal some of the conditional and group-specific effects . . . but they cannot tell us why certain students experience college the way they do or provide multiple, deeper, and accurate interpretations of what seem to be similar events in students' lives that individual students experience very differently" (p. 6). Harper and Kuh further stated, "[a]lthough complete objectivity in assessment is unattainable no matter what inquiry approach is used, this does not mean that accurate accounts of institutional realities and students' lived experiences are unachievable" (p. 7). The objective should be to establish and build authenticity through truthful, sufficiently detailed, and a fair reflection of the qualitative data (Harper & Kuh, 2007; Neuman, 2006).

### **Qualitative Approaches**

The qualitative researcher employs naturalistic and interpretive methods to reveal individuals' perceptions and actions, within a social context, related to their personal experiences (Denzin & Lincoln, 1994). Qualitative research is naturalistic as it is conducted in the participants' natural environment. There are no preconditions, set definitions or contrived circumstances (Hughes, 2006). Westbrook (1994) stated,

[N]aturalism is an approach that posits reality as holistic and continually changing so that theory formation becomes an ongoing process designed to understand phenomena. As such, the naturalistic approach should provide

much needed insights into information seeking experiences . . . The research problem must determine the research approach and the methods employed. No single approach fits every problem . . . If so little is known of an area that the simple identification of what is not known becomes problematic then the naturalistic approach with its qualitative methods might be used (p. 242).

Ideally, naturalistic research is conducted over a lengthy time period. A long time frame can be impractical and the research difficult to conduct due to the complexity of the situations and the questions that need to be asked. Therefore, researchers at times “must limit the scope of their observations to the behaviors that are relevant to the central issues of the study” (Cozby, 1977, p. 93). The researcher attempts to understand (interpret) how the participants understand and make sense of the events, phenomenon, and situations they must successfully navigate (Cozby, 1977; Merriam, 2002 as cited by Clemente, 2010).

During the research process, the qualitative researcher does not attempt to distance themselves from the people or the situation (Cohen et al., 2007; Neuman, 2006). The researcher, within the limitations of the circumstances, attempts to enter the individuals’ complex world of personally constructed meanings to capture their perspective through the interview process (Cohen et al., 2007; Denzin & Lincoln, 1994; Neuman, 2006). The qualitative researcher, therefore, seeks to gain direct knowledge from the participants interviewed. This thesis’ research approach uses interpretive, qualitative methods. The qualitative approach is best suited to the nature of this research. It is only the mature individuals themselves who can describe the barriers they overcame on returning to and

continuing in their post-secondary studies. The returning adult learner is the one that summons up the motivation, externally supported or not, that allows them to persist and complete.

Harper and Kuh (2007) stated that the biases and values of the researcher, who is immersed in the research environment, makes subjectivity unavoidable in the research process and it is futile to seek objectivity, pure or otherwise. To offset the objectivity desired by quantitative researchers, the qualitative researcher works toward trustworthiness. It is the rigorous methods and the rich content of the research produces conclusions that are credible and reliable (Cohen et al., 2007; Harper & Kuh, 2007; Neuman, 2006).

Borg (1963, as cited by Cohen et al., 2007) stated, “[r]esearch is a combination of experience and reasoning and must be regarded as the most successful approach to the discovery of truth . . .” (p. 4). Shenton (2004) stated that the trustworthiness of qualitative research is frequently brought into question by those favouring other research approaches. The concepts of validity and reliability used in alternative research approaches<sup>23</sup> are not satisfied in the same way in qualitative research with its non-linear, interpretive methods (Neuman, 2006). Guba (1963, as cited by Shenton, 2004) proposed four criteria the qualitative researcher can use to support the trustworthiness of the process and its products. The four criteria are credibility, transferability, dependability, and confirmability.

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<sup>23</sup> Specially, quantitative research methods collect hard data (reduced to numbers) and employ linear methods to arrive at a verification of or disproving a hypothesis (Neuman, 2007).



Credibility is enhanced if well-established research methods, such as those in this study, are used. Sample collection (the participants) principles, interviews, and methods conform to those suggested by experts in the field. Non-probability samples were collected in a purposeful (criteria based) and a haphazard (a number of convenience cases) manner to illuminate theoretically relevant aspects of a specific topic (mature Second Career learners). Iterative and in-depth questioning was used to verify the consistency (participant honesty) of the responses (Guba, 1963, as cited by Shenton, 2004).

Lincoln and Guba (1985, as cited by Wallendorf & Belk, 1989) stated that transferability relates to the how well findings can be used in another context. Shenton (2004) questions whether seeking transferability is a suitable criterion for qualitative research as the reasonableness of inferring attributes to a large population from a small sample. Transferability of the findings of specific research may become evident when, and if, other researchers employ similar methods in a similar context and then produce similar results (Wallendorf & Belk, 1989)

Dependability is closely intertwined with credibility and transferability in that when the research is “repeated, in the same context, with the same methods and with the same participants, similar results would be obtained” (Shenton, 2003, p. 71). Therefore, the reporting of the research must be in sufficient detail to allow other researchers to replicate the work (Shenton, 2003).

Confirmability relates to the care the researcher excludes their personal biases and objectively reports the collected data and subsequent analysis. The findings must reflect the experiences and perceptions of the participants. The methods used need to be reported in sufficient detail so that the reader can determine the limits of acceptability of the data and findings (Shenton, 2003).

Cohen et al. (2007) stated that data analysis, which affects the findings, involves making sense of the participants' reports and assessing the methodology. They further stated, "[t]here is no single way to analyse and present qualitative data; how one does it should abide by the issue of fitness for purpose" (p. 537). The researcher attempts to accurately observe, provide sufficient detail, and fulfil the intent of the above criteria to support the trustworthiness of the research findings.

### **Qualitative Research and the Second Career Program**

A mature adult's constructed personal reality often reveals a need to be satisfied. Need satisfaction is the driver in motivation (Ivancevich, Konopaske, & Matteson, 2008). Adult learners have reasoned that higher education will satisfy their current and future needs. It is this self-constructed knowledge of reality; the defined need, motivation, and the solutions to problems encountered, this research seeks to describe and analyse. The research is conducted in the mid-life adults' environment, the natural setting as a post-secondary student, in order that they discuss the self-constructed meanings in their motivations and attendant actions (Neuman, 2006). The desired objective is to reveal commonalities useful to understand general behaviour in the mid-life demographic. The

qualitative approach is best suited to the nature of the research. It is only the mature individuals who have gone through the decision-making process to return to formal education and lived through the resultant experiences that can describe the barriers overcame to persist and complete their post-secondary studies. It is the role of the qualitative researcher to objectively and accurately collect the data, analyse it and produce the findings.

The motivation of the Second Career learner seems obvious. There is a pressing need to increase employability due to financial distress caused by loss of employment. It cannot be assumed the financial motive alone is sufficient to overcome all the obstacles the mature adult might encounter. The success of mid-life adults returning to studies often hinges more on external factors<sup>24</sup> rather than those directly related to studies (Rose, 2012).

Qualitative research often deals in areas where little information exists on specific phenomenon (Poggenpoel, Myburgh, & van der Linde, 2001). Ontario's Second Career Program is relatively new (OMTCU, 2012) and scholarly reports have not been found in the literature. Consequently, researching the experiences of Second Career learners is amenable to a design that is exploratory, descriptive, and contextually situated. The scientific method is observed in qualitative research in that one witnesses or records recollections of events then forms conclusions that leading to theory generation (Poggenpoel et al., 2001). Hoepfl (1997) stated that qualitative research is becoming the method of choice in academia.

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<sup>24</sup> Examples would be encountering mentally taxing institutional structural barriers or technology difficulties.

Thus far, there has been no scholarly research on the experiences of employability oriented mature adults returning to formal education through the Second Career Program. This research is explorative in that this topic area of the motivating factors, strategies, and barriers encountered by Second Career Program mature learners is new. The findings can form the basis of further research that is beneficial to mature adults, post-secondary institutions, and policy makers (Mbovane, 2009; Neuman, 2006).

The research describes the background contexts (the individual participants' personal social settings and situational factors), from which the mature Second Career learner came to the decision to improve their employability through further education. In addition, these descriptions seek to illuminate the diversity or similarities of the prevailing conditions, the perceptions formed, the problem-solving methods, social support mechanisms, behaviours, strategies and tactics utilised by the individual participants to persist and complete their academic programs (Cozby, 1977; Mbovane, 2009; Neuman, 2006).

### **Qualitative Sampling**

Qualitative researchers are concerned that a selected sample will yield data that will lead to a relevant description of a social event or phenomenon. The sampling objectives of qualitative research are in sharp contrast with those of quantitative research. An objective of quantitative research is the use a sampling method that strives to secure random sample large enough to yield data representative of a much larger population. These probability samples, as they are termed, generate collected data will have the

statistical probability of describing the actions of a much larger population. The results of the mathematical analysis are accurate generalizations regarding the population in question (Cohen et al., 2007; Neuman, 2006).

Non-probability samples are used in qualitative research, as the aim is to explore a unique social phenomenon. Cohen et al. (2007) stated,

In much qualitative research the emphasis is placed on the uniqueness, the idiographic, and exclusive distinctiveness of the phenomenon, group or individuals in question, i.e., they only represent themselves and nothing or nobody but themselves (p. 161).

Cohen et al. (2007) further stated that since the research findings will not lead to generalizations, how closely a small group represents the possible actions or reactions of a large population is not relevant and any wider application of the findings is fortuitous rather than intentional. Patton (as cited in Hoepfl, 2006) stated the size of the sample is not as important as the richness of the data and analytical skills of the researcher. The overarching research objectives are to determine how and why the subject phenomenon is occurring. This is best achieved by acquiring a full appreciation of the context in which it occurs (Cohen et al., 2007; McBride & Shostak, 2003; Neuman, 2006). The researcher gathers a large volume of data by being immersed, or is an active participant, in the researched situation. This data is then subject to in-depth analysis. This in-depth exploration compensates for the small sample size (Cohen et al., 2007; Neuman, 2006).

## **Qualitative Research Interviews**

The pre-selected initial interview questions are the vehicles used to explore the main issues and bring out underlying issues that may be operative for the Second Career mid-life adults. The responses to the initial questions generated further probing questions that elicited more data. The subsidiary questions on revealed topics, although quite common among the participants, led to clarifying information and an in-depth understanding of the perceptions, social support mechanisms, and problem-solving actions taken. The primary source of data for the research comes from the participants' interview responses. It is only the participants' that can provide the background information leading up to their decisions to return to formal education, the motivations, challenges, barriers, and strategies implemented in their academic journey. Although some background information is on file with the college, this is not directly available due to privacy policies<sup>25</sup>.

The collected qualitative data is inductively analyzed to construct meaning from the revealed ideas and motivations. The product of the analyzed data, supported by analogous research literature findings, builds up to theory. To contrast with quantitative research once more, in quantitative research a hypothesis is developed prior to the research which tests, verifies, or negates the hypothesis (Neuman, 2006).

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<sup>25</sup> See: <http://www.centennialcollege.ca/Legal/freedomofinformation>

The observed constellation of the interviewee's behaviour (e.g., confident, tense) verbal manner of responding to questions (e.g., whether hesitating, thoughtful, rapid), use of language (e.g., well spoken, limited), plus the emerging themes and patterns form the basis of the resultant theory (Cohen et al., 2007; Neuman, 2006). The emergent theory is developed from the ground-up, rather than accumulating evidence to explore the usefulness of an initial hypothesis. The process of interpretative qualitative research yields generalizations that provide meanings and explanations for the observations made by the researcher (Neuman, 2006).

As described above<sup>26</sup>, the initial questions are only the means to get the information flowing. New questions were spontaneously generated as the dialogue continued. During the interviews, a pattern developed that the subsidiary questions generated were similar in overview. The Second Career eligibility requirements meant that each participant was de facto pre-screened as they were all mature adults, unemployed for a given period of time, had few options due to skills deficiencies, and were amenable to the further education option to reverse their unemployed status. Each participant engaged in an animated discussion of their classmates' motivational support and their diverse external support mechanisms (friends or family).

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<sup>26</sup> p. 69

## **Sampling**

### **Participant Selection.**

There are ten public post-secondary institutions in the Greater Toronto Area (GTA).<sup>27</sup> The Second Career Program objectives favours the practical studies offered by the colleges rather than universities. The research was conducted at two of the campuses of Centennial College of Applied Arts and Technology, both located in the Scarborough area (in the east end) of Toronto. Centennial College is student-centred oriented, post-secondary institution directly involved with and actively recruiting Second Career students.

It may be worthwhile noting that Centennial College is essentially a commuter school. There is a relatively small student residence facility near the main campus. The student body is diverse with a high international student enrolment, which at just under 25% is the near provincially imposed limit (Michael Vourakes<sup>28</sup>, personal communication, May 7, 2013). Campuses are located in densely populated urban environments.

Of the six area colleges, Centennial College has specific staff dedicated to the recruitment of Second Career enrollees. Designated individuals assist the potential enrollees through college life orientation sessions. Prospective students are given advice

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<sup>27</sup> University of Toronto, York University, Ryerson University, Centennial College, Seneca College, Durham College, Sheridan College, Humber College, George Brown College, and the University of Ontario Institute of Technology.

<sup>28</sup> M. Vourakes, Dean of the School of Business, Centennial College of Applied Arts and Technology.



on what Second Career Program aspects need to be completed by the individual and what assistance the college can provide during the application process.

The objectives of the college are to provide the prospective enrollees with sufficient information on the Second Career Program to be accepted, the social and academic aspects of college life, and the challenges of returning to studies that will prepare the individual for academic success (Gail Derrington<sup>29</sup>, personal communication, March 11, 2013).

The active recruitment measures taken by Centennial College and the location of the majority of the Second Career students narrows the selection research location to the two campuses of Centennial College, Progress and Ashtonbee campuses. The Progress Campus is focused on business, engineering, and other academically oriented programs. The Ashtonbee Campus is the major vocation oriented (i.e., skilled trades) campus.

The Second Career office of Centennial College was contacted for background information on the Second Career program and the to-date involvement of the college in recruiting and assisting students. The office personnel agreed to collect e-mail addresses of Second Career students and broadcast the previously prepared participation solicitation e-mail script<sup>30</sup>. The broadcast e-mail was sent twice to ensure there were sufficient numbers should some participants withdraw before or during the interview process and if the interview(s) was (were) of poor quality (due to extreme brevity of responses).

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<sup>29</sup> Manager, Employment Training Centre – Centennial College of Applied Arts and Technology.

<sup>30</sup> In spite of dire predictions concerning the reluctance on the part of students to participate, the response was immediate and quickly satisfied the basic needs of the research effort.

Fortunately, the first e-mails sent yielded a sufficient number of volunteer respondents initially desired for the study.

Participants for this research were those currently enrolled in college near the end of their program. Two-year program learners were preferred. Near the end of one's program, the various factors, personal and institutional, involved with studies can be recalled from an overview perspective. Longer programs imply further distance in time from pre-studies and first impressions of post-secondary education upon initiating studies. Personal recollections are likely to be fuller and accurate when less time has elapsed. This is not to question memory reliability, but to acknowledge that memory can be selective with the passage of time.

There is the potential a willing participant, consciously or unconsciously, would wish to help the researcher and tailor the information content to what is perceived to be agreeable to the researcher. Even though the participants were volunteers, there is the alternate possibility that with certain topics the participant may have been, consciously or unconsciously, reluctant to be completely forthright. Either occurrence would bias the data collected. The preceding possibilities did not appear to materialize. In every case, there was no hesitation in the responses to the interview questions (the answers were spontaneous) nor was there any suggestion a participant was reluctant to answer any question. There was no monitoring the researcher for signs of approval during the responses. The participants simply told their story, in most cases quite eagerly.

The initial desired number of participants was to be at least 16 mature adults, over 40 years of age, currently in or recently completed their studies through the Second Career program. This basic requirement of 16 Second Career mature adults was easily satisfied through the first e-mail solicitation<sup>31</sup>. Additional selection criteria included participants with relatively continuous residency in Canada for most their adult working life (more than 15 years in the workforce)<sup>32</sup>. Long-term Canadian residency was viewed as desirable to minimize the effect of culturally based values acquired prior to immigration. The longer the participants' lived, worked or acquired education in Canada then assimilated values would tend to have a greater effect on the individual. Specifically, the motivational effect of a belief in and commitment to lifelong learning would be acquired through recent cultural influences rather than the persistent influence of the culture of origin<sup>33</sup>. These additional selection factors were easily satisfied through the first e-mail solicitation.

## **The Interviews**

The planned schedule allotted approximately two hours for each interview. Completion time for all interviews was estimated to total 32 hours. Although it had been anticipated there may be some participants who would be reluctant to devote two hours of their time, this proved not to be an issue.

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<sup>31</sup> See Appendix 5

<sup>32</sup> All the selected participants were either native or long-term Ontario residents.

<sup>33</sup> Due to the high numbers of foreign born individuals and those born in Canada raised in Toronto but strongly influenced by the family's country of origin heritage, other cultural influences cannot be totally eliminated (City of Toronto, 2012; Statistics Canada, 2009).

The Second Career office of Centennial College agreed to send out broadcast e-mails to all the Second Career students. The form letter e-mail (Appendix 5) identified the researcher, the reason for the research (degree completion), the subject of the research, the estimated interview time, and solicited the learners' response by e-mail. As the volunteer's e-mails arrived, the participants were contacted either by return e-mail or the supplied telephone numbers. The volunteers were advised that mature adults were desired for the research and a request was made for their available times. The scheduled interviews occurred at the college in small rooms used for a variety of interview purposes. The first twenty minutes was not audio recorded and consisted of reviewing the previously provided e-mail information, discussing anonymity, the need for contrived identifiers (two letter initials) for the interview recordings and the finished research findings, the ethics review procedures required to arrive at the present stage of the research process, the explanation and signing of the informed consent form.

As the participants were prepared for two-hour interviews, a leisurely pace was established at the onset for what would appear to be an informal discussion. This informal atmosphere was intended to relax the participants in order that they speak freely and spontaneously. If the participant rambled off into an interesting tangential area, this would be encouraged. Sessions were audio recorded for later analysis. This minimized taking notes by hand. Frequent writing might prompt unnatural behaviours in the participants. As discussed above, to ensure the free flow of information it is necessary to create a comfortable atmosphere of trust and rapport (Cohen et al., 2007; Janesick, 1994).

Any distracting conduct or activity that the participant might construe to be part of an artificially constructed setting was avoided.

Qualitative research begins with the development of a short list of questions that focus on topic areas. These are often vague or imprecise. These types of questions are intended to stimulate the emergence of fuller topics. Janesick (1994) pointed out that the selection of research methods hinges on the existence of these research questions. The initial questions are the basis of the research design, which gave direction to the inquiry (Janesick, 1994). These questions assisted the qualitative researcher to develop the inquiry in a guided fashion (Janesick, 1994; Neuman, 2006). The earlier interviews produced a few subsidiary questions to the initial questions that were incorporated into later interviews. The participants, on average, were quite talkative and gave a full account of their experiences. It was seldom necessary to encourage the participants to elaborate on any point.

Although a sequence of steps can be outlined for each research project, after the initial questions are posed the interview path often becomes non-linear (Neuman, 2006). Janesick (1994) stated that the qualitative research design and questions are both flexible. As new questions emerge, the elasticity of the design permits exploration into unexpected, newly revealed areas. The interpretive approach of qualitative research concerns the behaviour of individuals (Cohen et al., 2007; Ivancevich et al., 2008; Neuman, 2006). The researcher is concerned with the participant's will to share their experiences. Authentic communication is necessary to produce an accurate picture of the topics being explored (Cohen et al., 2007; Janesick, 1994). Behaviour drivers are

intentional and focused on the future. These drivers are the essence of personal motivations (Cohen et al., 2007; Ivancevich et al., 2008; Neuman, 2006). As stated above, the volunteers were very understanding and co-operative in terms of scheduling the interviews, grasping the necessary ethics procedures prior to the audio-recorded phase of the interview, and they responded freely to the interview questions.

Developing and maintaining a semi-structured, conversation style interview is one way to establish trust and rapport. Therefore, a relaxed, unhurried conversational tone was established from the moment the participant arrived and used throughout the interview. Once trust was established, the participants felt free to relate their experiences and intentions. As new aspects arose, the researcher guided the interview, through the newly generated questions while maintaining focus on topic, and detecting the nuances communicated (Clemente, 2010; Cohen et al., 2007; Janesick, 1994).

### **Interview Questions**

A list of proposed initial interview questions is as follows:

- Would you consider yourself a lifelong learner;
- Was there more than a single motivation prior to starting;
- Has any motivating factor changed in the course of your studies;
- Do you have a long-term goal;
- Has your long-term goal change since returning to studies?

A list of proposed initial interview questions focused on Second Career learners are:

- Did your prior career end abruptly or was there time to make plans;
- Had you thought of returning to further education while employed, or prior to the Second Career program;
- Did the Second Career program make further education a viable option;
- After the Second Career program ends for you, will you continue formal learning sometime in the near future;
- What were your impressions or feelings when you actually began your program;
- Do you encounter expected or unexpected challenges during your program;
- What type of social (motivational) support did you have available;
- What advice would give a returning Second Career mature adult so they could be successful?

The first questions regarding self-identification as a lifelong learner seeks to uncover the long-term, past habits of the participant. If they have always engaged in formal learning, then the current state is only a pattern continuation. If they are newly returned to formal studies, does the current state indicate a long deferred interest? An affirmative response would open questioning into the cause(s) of the deferral. Additionally, a positive response can be an indication openness and predisposition toward further formal studies.

## **Data analysis**

The research area of midlife adults returning to post-secondary education has been little explored making it amenable to qualitative research. Therefore, there are many possible ways to collect, analyse, and present qualitative data as long as fitness for purpose principles are observed (Cohen et al., 2007). Cohen et al. (2007) stated, “[t]he purposes of the research determine the methodology and design of the research” (p. 115).

Bourg (2002) stated qualitative researchers conduct on-going analysis of their information on the environmental aspects, the possible interplay with the interviewee, and the recorded interview information. This analysis is directed to reveal themes, connections to theories, and aid in reconstructing thoughts, plans, and logic of the research at hand. Interpretations arise from, hence are grounded in, the collected data.

Coding responses assists in recognizing and then categorizing patterns or themes in the data. Coding highlights similarities and differences within the categories of the various accounts (Cohen et al., 2007; Neuman, 2006). Similar responses (positive, negative or neutral) for specific questions would be the simplest category system. The interpretive aspect of the analysis is to lead to theory through inductive means (Cohen et al., 2007; Neuman, 2006). Inductive development of theory begins by “observing the empirical world then reflect on what is taking (has taken) place, thinking in more abstract ways, moving toward concepts and propositions” (Neuman, 2006, p. 60).



The research objectives lend meaningfulness to the collected data through the comparing, contrasting, and interpreting the patterns or themes (Berkowitz, 1997). Of the various data analysis approaches available, this research mainly involves textual analysis of the recorded interviews.

Qualitative research does not have a standardized data analysis approach. This allows versatility and flexibility in analytical and reporting methods. This does not mean the analysis is not systematic and undisciplined (Berkowitz, 1997). Miles and Huberman (1994, as cited by Berkowitz, 1997) divide qualitative data analysis into three stages the first of which is data reduction<sup>34</sup>. In the case of this research, data reduction is process of selecting, focusing, and simplifying the recorded interviewee responses. Berkowitz (1997) cautions that care be taken in the data reduction, avoiding an overly mechanistic process, of what is a complex iterative process. Too much simplification can render the data meaningless and unintelligible (Berkowitz, 1997).

There are choices the researcher makes in the selection and description of the data. To stay focused on the objectives of the research, the categorization (coding) of the data must be guided by the research questions. This does not mean that discovered issues should not be examined. It does mean that commentary that is not related or is tangential to the research objective should not be included in the analysis (Berkowitz, 1997).

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<sup>34</sup> The second and third stages are data display, and conclusion verification (Miles & Huberman, 1994, as cited by Berkowitz, 1997)

All 16 participants de facto went through a pre-screening process prior to volunteering to participate in this research. Although the participants diverse backgrounds and selected different academic programs, they all had to meet the qualifying criteria for Second Career support. They were all over the age of 40, had been away from formal education for a significant period (See Table 1.0). They recognized their skills deficiencies and education would be the solution to relieve those deficiencies and increased their employability. They all selected Centennial College as the college that suited their learning needs. They volunteered without hesitation to share their experiences by becoming research participants. It is not surprising that there was a good deal of similarity in their perceptions and college experiences hence a commonality in the interview responses.

The interview questions defined the broad categories of the participants' responses. The Questions under the below heading of *Qualifying for Second Career* were intended to develop an understanding of the participant's personal and employment background and if learning was an integral part of their history. If they were lifelong learners, then the education opportunities presented by Second Career would be a natural consequence of existing attitudes. If learning was not part of their ongoing lives then the choice to engage in Second Career may have been difficult to make, a de facto barrier.

**Table 1.0 Participant Profile and Interview Data**

	<b>Participant</b>	<b>Age</b>	<b>Gender</b>	<b>Marital Status</b>	<b>Children living at home</b>	<b>Program</b>	<b>Program Status</b>	<b>Interview time - minutes</b>
1	<b>K.M.</b>	40	F	Married	2 – pre-teen	Law Clerk	Completed**	117
2	<b>A.S.</b>	40	F	Single	1– pre-teen	Law Clerk	2 <sup>nd</sup> of 2 yrs.	140
3	<b>R.R.</b>	43	F	Single	1– pre-	Early Childhood	2 <sup>nd</sup> of 2 yrs.	130
4	<b>R.J.</b>	43	F	Married	2– pre-teen	Paralegal	In progress (1	118
5	<b>L.G.</b>	45	F	Single	nil	Accounting	2 <sup>nd</sup> of 2 yrs.	102
6	<b>G.K.</b>	45	F	Single	nil	Human	Completed**	125
7	<b>C.C.</b>	46	M	Single	nil	Computer	1 <sup>st</sup> of 4 yrs.	123
8	<b>Q.I.</b>	50	F	Married	1- teen	Nursing	Completed**	126
9	<b>B.K.</b>	50	F	Married	2-teens	Accounting	2 <sup>nd</sup> of 2 yrs.	116
10	<b>B.B.</b>	51	M	Single	nil	Wireless	2 <sup>nd</sup> of 2 yrs.	130
11	<b>L.A.</b>	54	F	Single	2- adult	Personal Support	Completed**	123
12	<b>N.R.</b>	55	F	Married	2- adult	Early Childhood	Completed**	116
13	<b>A.J.</b>	55	F	Single	2- adult*	Recreation &	Completed**	144
14	<b>R.L.</b>	56	M	Single	nil	Recreation &	Completed**	135
15	<b>Q.C.</b>	58	F	Single	nil	Medical Office	Completed**	129
16	<b>R.Z.</b>	60	F	Single	2- adult	Travel &	Completed**	115

\* Special needs

\*\* Graduand at time of interview.

The category heading *The True Beginning: Second Career Application Approved* explored the emotional reactions, attitudes, and intellectual responses when the participant began their studies. The questions were to prompt the recollections of the reality of going to college on the first day, seeing all the students especially those younger than themselves, and the academic workload ahead of them.

The *Study time, Challenges, and Support* category questions were meant to reveal the time management strategies and actions. Determining if the participant been informed of or anticipated the various factors of their lives that needed to be address, specifically the co-operation of family and friends, so they could devote the necessary time to their studies. Although the Second Career Program provides some financial aid, a significant financial barrier may have arisen due to the participant's restricted budget. The tactics to cope with unforeseen financial hurdles may have been effective or was the situation an emotional burden.

The *Social and Academic Support* questions were to determine if the participant formed social support networks. The type of networks were formed (peer aged, mixed age, lasting, transitory) and how often they were used to improve motivation and general attitudes may have been key to academic success. If no network associations were formed, then what were the strategies used to self-motivate?

The *Learning Attitudes and Future Plans* questions were to determine if the participant had become enamoured with learning during their academic journey and they now wished to continue their studies in the future. The change in attitudes and feelings of self-esteem, self-worth, and accomplishment by completing any or all of their courses were to be explored. If there had been a significant change regarding the prospect of

further formal learning, then this would indicate that they gained more than content knowledge. An objective was to reveal a personally transformative experience that was caused through their return to post-secondary education.

The participants' *Advice for Prospective Second Career Learners* was an indirect questioning of what they had learned about themselves during their time in college. This would be a self-evaluation of their success and transformation, which might not have been attempted before the question asked during the interview.

The last phase of the analysis was to take an overview perspective of the participants' reports. The significance of the responses in aggregate can be used to inform other mature adult learners as to what to be prepared for in their return to formal education. The special needs of adult learners, if there were and those needs were not highly unique, would benefit post-secondary institutions regarding the services they provide or need to adjust for older learners.

### **Researcher Bias**

This author is member of the 40+ demographic and had returned to formal studies voluntarily after a 20-year absence. It may be difficult to separate personal values and experience from the data gathering and analysis. There have been several years of experience teaching and learning in age diverse classrooms. Although researcher bias is to be expected in qualitative research, information (data) might be overlooked or emphasized hence biasing the meanings conveyed. Information may be unconsciously downgraded, therefore not fully explored, as it may not be seen as an important factor in the researcher's own experience. At the other end of the spectrum, points less important

to the participant(s) may be unconsciously deemed important (to the researcher) thus pursued more vigorously than is necessary.

In an effort to minimize researcher bias, the speech patterns and body language of the participants were carefully observed for emotional signals (such as enthusiasm, reluctance, or other). The audio recordings were repeatedly checked for the clarity and length of responses. (Longer, free flowing responses were viewed as demonstrations of enthusiasm, commitment or negative reactions to the topic questions.) Temporal distance from the interviews, and the matter of fact nature of the recordings, produced a more objective perspective to analyze the responses.

### **Ethics Review**

In accordance with the requirements of Memorial University of Newfoundland and Centennial College of Applied Arts and Technology for conducting research on human participants, the researcher had completed the required documentation and application forms to secure approval prior to commence the research. The ethics review process is designed to assure the ethics approval boards of the university and the college, respectively, that the highest standards of ethical conduct and scholarly integrity will be met in the course of the proposed research. The required documents and forms for both institutions were quite similar with only minor format differences and phrasing of the application questions.

Ethics approval application was first made to Interdisciplinary Committee on Ethics in Human Research (ICEHR) at Memorial University of Newfoundland. Although the study posed minimal risk to the volunteer participants, ICEHR requires assurances the study will protect the protect anonymity of the subjects and confidentiality of the information provided, rights and welfare of the participants involved will be preserved, to establish and ensure a level of trust of those critical factors between the researcher and participants.

Once the approval of ICEHR had been secured, the application was made to the Centennial College Research Ethics Board (REB). Prior ethics approval by ICEHR did not hasten the approval process but it did add weighty evidence of the soundness of the application. The REB placed special emphasis on the completeness of the Ethical Research Application and Freedom of Information and Protection of Privacy Agreement prior to approving the research. Additional information on the scientific merit of the research was requested and provided.

The research interviews and data collection conformed to the approval process and was accepted by Memorial University of Newfoundland's and Centennial College of Applied Arts and Technology's ethics review committees (respectively). The researcher developed and secured freely signed informed consent forms from each of the participants. Copies of the signed informed consent forms were provided to each participant at the termination of their interview session. The participants clearly understood their involvement in the research was voluntary and could withdraw any time and the collected information would be surrendered immediately. (No participant

withdrew from the study.) As an assurance and guarantee of participant rights informed consent, a copy of the form is provided for inspection in Appendix 3.

### **Summary of Chapter 3**

This chapter has described the methodology approaches, techniques and participant selection criteria used to design this interpretative, qualitative research study. The scientific community has several established approaches to research. The two main research views respected by the scientific community are the quantitative approach and the qualitative approach. To date, there has been virtually no scholarly research on the success of the program or the experiences, persistence strategies and the post-secondary academic success of the returning mature learners. Unexplored research areas are well suited to qualitative research. In qualitative research, the researchers enters the subjects' (participants') context to explore the relevant aspects of their lives and social environment. The purpose of the research is to explore and examine the motivations and barriers encountered by mid-life learners returning who have returned to post-secondary education under Ontario's Second Career Program. The Second Career Program provides qualifying unemployed adults with financial support to improve their employability to secure in-demand jobs.

A total of 16 Second Career Program volunteer participants, over 40 years of age, were used in the research. These native or long-term Ontario residents participated in interviews to provide the qualitative data in the form oral descriptions of their thoughts, perceptions, and recollected experiences. These recollections are the impressions, actions



and reactions to the situations encountered prior to and during their academic programs. The participants responded fully and spontaneously to the initially prepared and subsidiary interview questions. During the interviews, the participants did not display any reluctance to respond to any question and did so in an honest and direct manner.

Although the participants came from diverse backgrounds and work experience, they essentially went through a pre-screening process prior to volunteering for the research. In fact, this occurred to a significant degree prior to the start of their post-secondary studies. They all had to meet the qualifying criteria for the Second Career Program. They were all over the age of 40, had been away from formal education for a significant period. They recognized their skills deficiencies and that education was the means to increase their employability.

The interview questions used in this qualitative research defined the categories for the participants' responses. The *Qualifying for Second Career* category heading, used for reporting and analysis, were intended to describe the participant's personal and employment background and determine if learning was an integral part of their history. *The True Beginning: Second Career Application Approved* category contains the emotional reactions, attitudes, and intellectual responses when the participant began their studies. The *Study time, Challenges, and Support* category questions were meant to reveal the time management strategies, conflicting personal factors and coping actions. The *Social and Academic Support* questions were to determine types of social support networks formed and the benefits derived. The *Learning Attitudes and Future Plans* questions were to determine if the participant had become enamoured with learning

during their academic journey and they now wished to continue their studies in the future. The participants' *Advice for Prospective Second Career Learners* was an indirect questioning of what they had learned about themselves and their post-secondary experience.

The chapter ends with presenting the potential for researcher bias and some counteractive measures. The ethical review approvals of both ethics review committees of Memorial University of Newfoundland and Centennial College of Applied Arts and Technology, for whom the participants were recruited. The ethics review approval requirements of both institutions were met in order for the research to proceed.

## **Chapter 4: Presentation of Research Findings**

### **Introduction**

Chapter 4 provides profiles of the participants beginning with the life and work experiences they have in common. Background information is provided to describe each participant's family or social context. The participant's path taken to consider and apply for the Second Career Program is presented briefly. The chapter concludes with the response to the research question categories. The responses recounted are typical and the best articulated by a participant in those question categories.

### **Research Participants**

#### **Common Characteristics and Experiences**

The confidentiality and anonymity of the research participants has been assured with mutually agreed upon contrived initials to differentiate the interviewees. Many characteristics and experiences were common to all participants. Unless otherwise noted, the participants were foreign born and have been in Canada at least 10 years, with a few from early childhood. All the participants had a significant period of unemployment with either employment insurance about to or having already run out prior to being approved for the Second Career program. Few participants saw any warning signs there employment was likely to end soon. None of the participants had taken any steps, through learning or job hunting, prior to the lay-off. The Second Career financial benefits made full time studies a viable option for all the participants. The majority of participants

had high praise for the Second Career program and would recommend it to others who found themselves suddenly unemployed. Although their studies proved to have higher than anticipated workloads, the participants exhibited positive attitudes towards the learning experience. They found the learning to be confidence building and yielding a strong sense of accomplishment. The participants who were near or who had ended their studies felt open to the possibility of further formal learning, on a part time basis, in the future. This represented a change in thinking from that might have been the case prior to returning to studies.

### **Research Participant Profiles**

K.M. is a 40-year-old female, re-married mother of school-aged children. Her previous employment was in administration working under a contract. K.M. had hoped the contract would evolve into permanent employment. She recently completed the Law Clerk program. There were some reorganization changes at the place of employment but the lay-offs occurred without warning. Although self-reporting as a lifelong learner, there had no preparation, through formal learning, prior to employment termination. A self-described competitive person, K.M. set a high target for her grade point average and was able to reach that personal objective. She was the only research participant that had secured employment before graduation by virtue of her program placement.

A.S. is a 40-year-old single mother of young child. Due to a change in her marital status, she was unable to continue as a building superintendent. The position was for couples only. A.S. enjoyed her work and would have been content to continue in that role. After a fruitless job search, she became aware of and submitted her application to the Second Career program. A.S. has completed the first year of the two-year Law Clerk program. Constantly smiling, she has a positive, self-confident, and effervescent personality. A Canadian by birth, she thinks and speaks quickly exhibiting a good command of a broad English vocabulary. She self-describes as being an avid reader throughout her life.

R.R. is a 43-year-old female, single mother of a disabled child, studying in the Early Childhood Education program. Previously an assembler in a factory, her career background prepared for in her country of origin had limited or no use in today's Canadian job market. She recognized after her employment ended that formal learning was the only route to a better career that afforded some stability. Although she expressed herself very well, like many speakers of English as a second language, she felt and feels her command of the language is inadequate.

R.J. is a 43-year-old female former commissioned, retail salesperson currently pursuing the Paralegal program. Currently she is in the second semester of the one-year program. R.J. is married with school-aged children. As she had previously earned a college diploma, this qualified her for the accelerated Paralegal program. R.J. had set a

grade point average target of 3.2 out of 4.5 <sup>35</sup>quality points. Given the intensity of the accelerated program, R.J. is uncertain about future learning. In the future, if there was less pressure than she is currently experiencing, the concept of continued formal learning on a part time basis does appeal to her.

L.G. was a former junior accountant/bookkeeper and is a female at 45 years of age. She is single. L.G. had thought about taking courses in the past but did not act on those thoughts prior to becoming unemployed. After six months of unemployment, L.G. learned about the Second Career program from friends. L.G. has a pleasant, calm personality. Although she responded to all questions in a positive, open manner, she was the least talkative of the participants. Her responses were brief.

G.K. was a June 2013 graduate. She is a 46-year-old female who was a restaurant manager who was laid-off shortly after returning from a vacation. G.K. has completed the Human Resources Management and was eagerly awaiting the June Convocation Ceremony. She had heard about the Second Career program as a result of an earlier lay-off in 2009. G.K. did minimal research into Second Career but securing a new position caused the investigation to come to an abrupt end. G.K. has a pleasant, self-assured, dynamic, and determined manner. G.K. has a bachelor's degree in adult education from "back home" but did not want to return to teaching. She describes herself as an Internet researcher keeping up with current affairs and subjects of personal interest. In terms of personal objectives, she describes herself as a determined fighter diligently pursuing any objective she has chosen.

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<sup>35</sup> Grade point of 4.5 = A+ (90+%). See: <http://www.centennialcollege.ca/gradingpolicy-revised.pdf>

C.C. is a single male who lives alone, 46 years of age, is in the second semester of a four-semester of the Computer Network Technician program. He was formerly in credit collections. This was a position that required travel. A lifelong learner, he was quite surprised by the high workload of the program. C.C. speaks with a light but noticeable accent, periodically chuckling while exhibiting a very good command of English. He expressed his thoughts and feelings with little hesitation.

Q.I. is a 50 year-old former nursing administration worker had completed her studies in the Nursing program. She is married with an older child who is still in school. She has found the level of effort required for the Nursing program has dampened the prospects of further formal learning. She has a friendly, self-assured personality, and not shy about correcting misapprehensions or asking for clarity on any question or statement. Q.I. is a determined and self-confident person. Given that she worked in hospital setting with professionals that are popularly believed to have strong personalities, Q.I.'s assertive manner may have been cultivated there.

B.K. is a 50-year-old married female with young adult children and former restaurant owner. The restaurant had to go because it was in a construction right-of-way. There has been formal learning in her past but nothing amounting to a credential. Similarly, her past employment represents a variety of roles. She has finished the first year of the two-year Accounting diploma program. To improve her heavily accented English, she intentionally avoids classmates that speak her native language. She is determined to improve her language skills as she realises this will be a benefit in her future employment.

B.B. is a 51 year-old single male formerly in telecommunications, commission sales. Business was in steady decline to the point that earning a living was no longer possible. He has a master's in systems engineering earned in 1985 from a university in the United Kingdom. The United Kingdom is not his country of origin. He has been in Canada 11 years. Upon arrival in Canada, he had thought of pursuing more education but felt he was too old, at age 40, to go on. He has since changed his mind. While smiling most of the time, B.B. exhibits a positive, outgoing, and cheerful personality.

L.A. is a 54-year-old female former administrative assistant. L.A. is a single mother of adult children who still are living at home. One of her children has not been supportive her efforts. There were signs there was to be a downsizing, but thought she would be one of the survivors. The firm eventually was sold which meant the end of her position. She completed the Personal Support Worker program in April and was looking forward to the June Convocation. L.A. has a self-described newly acquired self-confident attitude. L.A. recognized this personality transformation was the result of her successful journey in college studies. Her personality can also be described as effervescent.

N.R., a 55-year-old married female with adult children, was another imminent graduate that completed the Early Childhood Education. She describes her previous position as advanced clerical work. N.R. might be described as a classic, dignified European woman. She has had a dream of going to university for a long time. Given her present elevated confidence, which she assigns to her successful completion of her program, there may be a possibility she may pursue her dream. Smiling, she stated that "university just might be in the future."



A.J. is a 55-year-old female, formerly an administrative assistant. She chose the Recreation & Leisure program to study. Her program is complete and she was happily awaiting the June Convocation. She is a single mother with special needs children. Much of her adult life has been focused around the children. She left school early without completing, returned to studies periodically, and finished her final credits for a high school diploma just over five years ago. One of the few by birth Canadians interviewed, A.J. exhibited a cheerful, positive attitude, smiling pleasantly frequently and especially when she was amused by how she had phrased a response.

R.L. is a 56-year-old single male in the second semester of the four-semester Recreation & Leisure program. His objective is to work in gerontological settings. He cares for his aged parents and this is one of the motives for his interest in gerontology.

R.L. volunteered, before the start of the interview, that he felt this type of research needs to be done for “all the (mature) students who are really struggling” with their studies. Of all the participants, R.L. was the only one that appeared weighed down by the work. His personality is serious and thoughtful, but not unfriendly. Similar to the other students R.L. had alluded to; he said he was struggling even though his grades were good thus far. R.L. could be described as a person of somber mood as he did not attempt a smile at any point in the interview.

Q.C. is a 58-year-old single parent female Medical Office program student. One of her two adult children is still living at home. Formerly she was an administrative assistant. She indicated the work environment was quite unpleasant and had been looking

for alternative prior to the lay-off. In her country of origin, she had had an interest in and had a learning certificate in broadcasting. Q.C. had taken a few courses at another college several years ago, but had to abandon it due to family responsibilities.

R.Z. is a 60-year-old female and former restaurant manager. She is a mother of adult children. R.Z.'s good example as a student has motivated her daughter to return to college. She has completed the Travel & Tourism program and will graduate in June. R.Z.'s intention is to start her own business. R.Z.'s mood is bright, enthusiastic, and positive. She said she had enjoyed her self-elected role as mother to the younger students. She believes that in this economy one has to create their own job. She has every intention to start her own business, which she will ultimately turn over to her children, as she says, "...when I get old."

### **Interview Findings**

As stated above<sup>36</sup>, there were a number of common features exhibited by the research participants. The first commonality being they were all volunteers recruited passively through a broadcast e-mail. There had been no face-to-face sales presentation made to convince the individuals to take part in the research.

The majority of participants had no warning their employed would soon end. Those that did see the signs of reorganization, downsizing, or potential termination of operations took no steps to look for employment nor did they consider reskilling through further

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<sup>36</sup> p. 90

education to improve their employability. A few of the participants believed they would be among the survivors should there be a reduction in the workforce.

All the participants had been unemployed for a significant period after an earnest, documented, and diligent search for employment. A minimum length of time being unemployed and the documented job search are part of the requirements to qualify for the Second Career program (OMTCU, 2012). The period of unemployed requirement implies the participants were near or beyond the date their employment insurance (EI) benefits were to end when an application to the Second Career program was made. The Second Career program gives higher qualifying points based on degree of financial need. The Second Career financial benefits made full time studies a viable option for all the participants.

All the participants were certain that further education would not have been considered while on unemployment benefits given the state of their personal financial situation. All participants felt that if they were not approved for the Second Career program their only option would be to continue to seek work utilizing their old skills or settle for whatever position they could secure without regard for quality of financial rewards.

All but two of the participants learned of the Second Career program through either their employment insurance office contact or another government agency. The two exceptions learned about Second Career through the popular media. Only one participant worked on their application for Second Career without assistance or attending any group information session. Nonetheless, the first barrier to deal with is the application process to qualify for the Second Career program.

## **Qualifying for Second Career**

A.S. learned of the Second Career program through various provincial government agencies when her employment came to an end. A.S.'s experiences in her prior role as a building manager lead her to believe there was a real need for a person who could explain various procedures to deal with legal matters and the workings of government agencies. It was her original intention to seek the education that would be suitable to secure that type of employment. A.S. felt the prior experience explaining forms and procedures to others was a benefit when it became time for her to apply to Second Career. She acknowledged the paperwork and requirements were daunting but “. . . it was hard, but you know what, if it is not hard, (then) it is not worth (it) . . . I did everything I had to do. . .” AS did not let the paperwork weigh her down by reminding herself that the effort was “. . . for my daughter, nothing is more aggravation than it is worth (when it is for) my daughter . . .”

L.A., at interview time was on the verge of graduating from the personal support worker (PSW) program, stated that she had a strong focus on that career. This strong desire provided some of the motivation to get through the application process. She stated, “what kept me going, I wanted to do the PSW . . . this is what I really wanted to do and this (Second Career) was my chance . . .” L.A. had learned of the Second Career program at an employment centre workshop. The facilitator asked L.A. to stay after one of the last remaining sessions to see if L.A. qualified. To L.A.'s surprise, she easily qualified. In spite of this easy program entry and L.A.'s prior administration experience, she admitted the paperwork did depress her enthusiasm. L.A. credited her eldest daughter for

periodically providing the extra motivational nudge to press on. L.A. stated “. . . at one point I said I can’t do this . . .” and her daughter came and took matters in hand. L.A. stated “she said, let’s start at the beginning and do one step at a time . . . and I did it!”

Q.I. had received information about Second Career from an employment centre. She had been told her qualifications were very good and she should be able to secure employment. Q.I. stated that “nursing is my passion. . .” At the time she considered Second career, she had run out of employment insurance benefits while looking for work. She completed the process of applying only to be turned down for funding in the nursing healthcare program and she would not take “no” for an answer. She had passionately argued with her Second Career contact, “I just don’t get it. . .you had put me through the wringer, (I) had to do all this research . . .go to colleges, interview workers, see if there was demand in the area . . .and after all that not to be accepted.” After vigorous effort, through the local city councillor, employment insurance office, and the Ministry of Training, College and Universities, she was advised by the employment office to re-apply as the rules did allow some latitude and certain areas the requirements had recently been relaxed. Although Q.I. had had the prior poor experience, she “followed through again . . . they wanted to know if I was jumping from one area to another or if there were transferable skills . . . I had the (medical) skills sets, I had worked for doctors, I had worked in hospitals . . .” Q.I., relying on strong internal motivation and determination, was able to get her application re-evaluated and approved.

## **The True Beginning: Second Career Application Approved**

Centennial College conducts academic assessments of the entering students and has orientation sessions specifically for those in Second Career. The orientation session can be quite large and the attendees represent a mix of ages.

A.J. felt the assessments in particular “. . . gave a sense of what type of test we would do . . . it also just earmarked (pause) just where it was going to go . . . I had been assessed . . . I knew I was in the appropriate class”. Commenting on the orientation which she said “. . . they were good - ahhh? I still think it gave you a full taste . . . it’s funny to listen to somebody in Second Career talking about the workload but you are still far removed from it at that point, because you haven’t started . . . so, you can listen and go ‘oh, well it’s his experience, my experience is not going to be like that’ . . . then you get into it and *it is* going to be like that . . . it is a lot of work. . .it is kind of exciting to be part of all that (the orientation) . . .there are a lot of older people coming back . . .” A.J. stated seeing that there were a lot of older people at the orientation did increase her comfort level regarding returning to studies.

R.R. recalled the early days and being concerned she would be the oldest in the class. She had engaged in positive self-talk regarding the opportunity that Second Career afforded and her capabilities. When it came to actually being in class she stated “so, I was open because my classmates are younger than I am – and most of my friends . . .I am always open to them . . . I say I am too old, they say no you are not . . . every time I see someone older than I am . . . they are my inspiration . . .”

R.J. is an alumnus of Centennial College who returned to studies after a long absence. She admits to still being frightened of the studies in her accelerated, two semester program which is a post-graduate curriculum. Although there are a few older people in her class, she stated that fact “(it) does make me feel better, but we all have different challenges, ya know . . . ahm, academically I am OK . . . there is a lot of stress . . . I spoke to this older lady (who experienced physical reactions to the workload stress) . . . mine (the stress) is different, everyone’s is different, I could not compare with others. . .” Being an alumnus did help with coping with studies and the classroom adjustments, “. . . actually that is one reason way I came back here, this course is offered in a few other colleges . . . the reason why I came back here was the familiarity . . . I graduated once . . . it was a nice experience I had, even though it was a long time ago. . .” After acknowledging she did fears about the studies, there had been support provide by her classmates. She said, “. . . everyone has been very encouraging this time. . .”

### **Study time, Challenges, and Support**

Q.C., a single mother of two young men, had a complex time management challenge. She is looking for work to supplement the Second Career funds to pay for living expenses. The older son is in college. She said her high school aged son “is with my sister, because that one likes to go out and I couldn’t have (pause) I couldn’t wrap it around my head the stress to worry about his academics . . . I had to make that adjustment . . . to make sure I had time to study . . .” Time management was big “it represented a

challenge because it is in the back of your head . . .you worry about a lot of things. . . if you have two people, whether is it a sister, brother, or somebody to meet half of the way. . .you do not have to worry as much. . .when you have to do everything yourself. . .” She realised and verbalised benefit in coping successfully with her difficulties by saying, “. . . in the end, it does make you stronger in a sense.”

G.K. stated there had to be both major and minor changes that were thought out in advance. She and her partner had mapped out the year for all factors that might and would be encountered. She felt that everything that could happen was looked at with contingencies built in to the plan should something occur to a key factor. This in itself contributed to her confidence and reduced worry. However, G.K. stated “study-wise, I did not expect it to be that heavy load in assignments, study . . . study hours for, dedicated study hours for, you know, the projects . . .” Looking at the heavy workload, GK stated this did not slow her down “my personality it is, I am a fighter, I would say, for me it was a challenge, but I was determined. . .” G.K. said that family and social commitments were adjusted and all parties were understanding that her studies had priority. When she was asked if she engaged in positive self-talk she said “yes, of course, yes, yes. . . all the time . . . part of my motivational talk was talking to others, ha ha, who were younger and I would say this is part of your future. . .united we will overcome. . .ha,ha. . .”

R.Z., the oldest of the participants, said she “is enjoying to be in school.” As R.Z.’s children are grown, she did not have the extra burden childcare to intrude on her study time. Time management was not that much of an issue. Having grown children translated into role reversal when her daughter asked her “how was school?” “I heard my



son laughing, he came out of the room and he said, “I think this is reversed. Mom is supposed to be asking how is school?” In terms of in-class support, R.Z. had early in the program formed a study/support group. When it came to projects “the teacher will bring us a finishing date, before that date we are done and have been practicing . . . and if someone would like to be with us, and if we know they are not good . . . we are sorry, we talk to the teacher please we do not (that person) in our group . . . we had had the same team from the first semester.” She noted that, “Some of my friends are as young as my children . . . and sometimes we go out to eat . . . my daughter laughs at this.” R.Z. reinforced her motivation by being the “mother” to her study group but she insists that she must, “. . . motivate myself. I have a lot of books at home - self-help books.”

### **Social and Academic Support**

The female participants tended to form groups of women they were drawn to in their classes. These groups were used for social support, academic purposes, and frequently both. These came as somewhat of a surprise to a many of the women. A.S. said, “I did not think I was going to connect with a single person, I really didn’t. . . I felt like I was the old hag. . .but they are not that much younger . . .they are just starting to get serious. . . thinking about getting married . . . and I’ve been through all that. . .”

A.J. noted being with twenty-somethings “had its moments . . .some were great, some were challenging . . . I was pleasantly surprised . . .I came back in thinking, oh gosh, I’m going to be the oldest in the class. . .there was another woman. . .who would

have been of an age. . . you find that you create a group that you tend to be with . . .and other people join the group from time to time . . . but, I developed a core group of - there's four of us who I think will stay in touch with each other long after we are finished here.” Responding to the question as to whether the group provided psychological support or if the group had been formed for study reasons, A.J. said, “I think that we were all . . .three of the four of us went together within the first three weeks of school and had a long talk about the fact that we were older than most of the other kids in the program and we wanted to be there as a support for each other . . .we defined that very, very quickly . . .we added a fourth person before the end of the first year.” A.J. went on to say, “we became a study group, we did a lot of projects together, ahm, we are just a support for one another.” At those times the academics became overwhelming, the group would rally around the troubled one. A.J. stated, “the interesting thing is we are a group of three women and one man . . . it is an interesting group because he brings that male perspective for us but we also give him all that female support . . . I think that sometimes the young people thought we all have this very strange relationship. . .they don't get we are just friends.”

A.J. noted that the core group members had similarities and differences that enriched the quality of the interactions. They all were parents, some single some married. There was different working experiences, a mix of genders, original Canadians and an international component. Then there were the temporary members of the group that brought other perspectives that contributed to the social aspects, mutual support, and the academic work.

B.K., who learned English as a second language, intentionally drifted from group to group to force herself to speak and thus improve her language skills. B.K. said “my vocabulary very weak. . .” even though she seemed to understand all the research questions and responded very quickly, although the grammar was not always the best. As stated above,<sup>37</sup> B.K. may at first talk with those of similar background but broadening her college experience soon takes priority. She said “I not talk with people who is same my country, because they always they talking our own language . . . I always choose someone who not my country’s people. . . I talk with them because I know our culture, everything is different, and I have to respect them first. . .”

B.B., typical of the male participants, he only joined groups when they were formed of course assignments or in-class work. This was in spite of his belief that he can blend in with groups easily. Responding to the question if he felt unusual being in a classroom with younger students, he stated “(laugh). . . actually, I’ll tell you the truth, the first few weeks everyone was looking at me . . . I was the oldest one in every class, every time . . . after a few weeks, they got used to it . . . everything just disappeared . . . we were doing the same things (in the course work) . . . I became just like them. . .”

C.C. stated when he came to the school orientation (to brief new students on expectations, procedures, and other useful information) he felt “out of place again, in the first day you have to introduce yourself . . . in every class I was the oldest. . .” C.C. said he did “. . . establish a rapport with my classmates. . .” Although C.C. lost the self-awareness that he was the oldest in the class, he only joined study groups “for tests, but

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<sup>37</sup> p. 94

usually it (meaning C.C.) was independent.” He acknowledged there was mutual provided psychological support he did get from the various groups and “yes, it definitely helped – especially for finals.” Yet, C.C. formed no lasting allegiances. He received most of his psychological support outside of the school context. This was similar to R.L.’s experience.

R.L., who has a significant responsibility for his aging parents, had yet not formed a support network among his classmates. He does get motivational encouragement from his parents. Some of the adjustments that cause him minor guilt feeling is that his routine domestic tasks are delayed or not completed. He stated his personal effects have become untidy and often the bed is not made properly. He did acknowledge that “if I did not have my parents, how would that be? . . . many times I was thinking that I need additional support . . .” During one semester, his mother became ill. This meant he had to shoulder many additional responsibilities. His sibling was only partially available and his aged father was of very limited assistance. The hospitalization of his mother brought other institution-based challenges and pressing decisions his way. “It absorbed a lot of my energies . . . after six days they removed her from hospital to rehab . . . then the practical nurse wanted (to administer a treatment) and for 40 minutes there was an argument. . .” This series of events caused his studies were put on hold. Somehow, he managed to prevail through the experience. “I managed to do OK, in my first assignment I got a “C” . . . but I was not sleeping . . . I feel the pressure of work, work, work . . . when I am not sleeping, I became irritable. . .and my co-workers (in his placement) did not understand. . .without this (trouble) I would be OK . . .” When asked about future prospects, RL stated

“on my parents side, yes. . . but I have some apprehension because of the third semester . . .there is a lot to learn, a lot to do. . .” Now, with a little distance from the major domestic problems, R.L. stated he had had confidence at the beginning of his studies he would be successful and that confidence continues to today. His doubt is “I have clarity, I can do it, yes but, the strength to do it is different . . . when I am in it - it takes so much energy. . . it is very tiring . . .” R.L. admits he keeps a great deal of problematic issues to himself. When he does discuss academic matters with his parents, he gets encouragement. “My mum, she was a teacher before. . .she says you can do it. . . when you come out of this you can be a doctor.”

R.L. had just finished his first semester in his program and had just started his second at the time of the interview. Preoccupied with family issues and the academic workload, during that semester R.L. only joined groups as was required by the course work. If he follows a similar path as the other male participants, he may continue the pattern of temporary group membership and only to satisfy academic needs. However, this cannot be predicted should there be a continued reduction in family concerns.

All of the participants had some form of support other than their classmates. This could have been encouragement from family or friends to continue studying when the content or expectations became challenging. The admiration expressed by family and friends provided moral support and encouragement. Support could simply have come in the form of understanding that the Second Career student needed time to study. Study

time may have caused family events to be seriously shortened attendance or missed all together. The fact that this was accepted by all resulted in relatively guilt free study time. This was more the case for those who were older, single without children, or those whose children were now adults. A.S. was one research participant who had to make a number of adjustments due to the young age of her daughter.

A.S. stated that her social life is “on hold well before school, but my family . . . my aunt and uncle raised me and they had - they carried me when I could not walk (metaphorical) they really were supportive to this day . . . and my friend who I keep in contact with by phone. . .” Commenting on the workload, A.S. said, “I am the sole provider for my daughter . . . knowing I had to do school during the day, come home, and get her homework done, get her fed, her bathed, spend some quality time with her, get her to bed and then I could start my homework and my studying. . .” which meant having fairly rigid time management to get everything done.

A.S. continued by recounting the outside support she had received from relatives when “my aunt and uncle had a (family) barbecue . . . I said I can’t go. . .” they told A.S. they understood the situation, there was no a problem with her decision. They came for her daughter and left A.S. at home to study. A.S. said her aunt and uncle’s assistance came to the rescue “. . . a couple of times (to take her daughter) . . . it wasn’t just for a barbecue, they would come and take her for the night just so I could have a couple of extra hours of study.”

## **Learning Attitudes and Future Plans**

G.K. was asked if there would be more education in the future. “(laugh) probably . . . of course . . . I guess this paved the way to many other things.” However, “it has always been part of the future, it is just you get so involved with your work . . . it depends on the employer you work for. . . if they embrace training and learning, it’s good, if they don’t you get involved in that box . . . (the box that makes you say) I can’t, I can’t. . .”

K.M. believes she will go further with her education “bachelor’s in something, I don’t know why. . .” but first “I am looking at the options what’s available with this diploma. . .” She realised in the course of her studies “opened up my eyes to all the other issues going on in the world how you can help . . . there other avenues . . . in your personal life, your community . . . just getting outside of professional areas and doing something else with you time . . .” She agreed her world had become a bigger place.

L.G. said that she previously had ideas about further education but life circumstances, especially with respect to her finances, made it only a dream. Second Career made many things possible. “I can take this (accounting) diploma to get the designation, CGA<sup>38</sup>; so many things have changed . . . even though I am 45 I don’t want to give up. . .”

Through her studies, N.R. became aware of other career possibilities within her field of study. When asked if she would consider additional education to pursue those opportunities she said, “Oh, yeah. . . even, even. . . I know - my age, I know I should stop.

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<sup>38</sup> Certified General Accountant professional designation.

. . but then I think I have to work until I am 65, I still have time . . .and feeling was to go to university when I came to Canada, just to upgrade but I couldn't . . ." As far as the academic challenge of university studies and has the college experience changed your thinking, " . . .I know, I know, I know I can do it, it is just financially. . ." Asked if the finances were there, she was asked if continuing education work be possible, she replied "I would do it but only with no economic, no financial worries . . . anything after that I can handle it; I know I can do it." She agreed that her sense of success to date contributed to her positive attitude toward learning.

In the course of pursuing the Law Clerk diploma, A.S. is now seriously considering the Para Legal program. "I may go on and do the Para Legal course after this one . . . it will depend on whether I can get funding, if not I'd have to go to work . . . maybe in the evenings. . . I think with this particular field there will always be courses to take because there will always be things changing in law and you have to stay current . . ." These comments came from a woman that was content in her former job and saw no need for additional learning. Things changed " . . . very much, very much . . . I was in college right out of high school . . ." she was not diligent in her studies at that time. "I had no motivation back then . . . things are different (now)." Her target grade point average is 4.0 out of 4.5.

A.J. stated she was always a lifelong learner although the record might not fully support that claim. She left high school early and later had a family. High school was completed later in life and phase out of her employment made Second Career a necessity as well as an opportunity. Her employment plus working for charitable organizations



provided many learning opportunities in order to gain and maintain skills. The completed two-year program confirms in her mind that, in total, she has been a lifelong learner. “[W]hen you are asked to go to a conference . . . there are three or four days of training . . . that I ended up using. . .” Acknowledging that her two years in college has been a confidence booster with regard to further learning, she then stated, “in about January my kid said to me ‘so, are you going on in school’ no, no I want to be done . . . in actual fact there is a post-diploma course here at the school . . . which myself and a number of other are looking into. . .” Then there is university, “a course I looked at a number of years ago that has been run off always been tucked away in a corner of my desk. . .” She acknowledges the learning bug has bitten here. “There is a course at Ryerson University . . . I have nine years to work on it.”

### **Advice for Prospective Second Career Learners**

In order to get the participants to think about the types of advice they would give to prospective Second Career learners, they interview questions often had to be rephrased or expanded to prompt their thinking. It would seem many had not reflected upon why they had been successful. Perhaps, they were caught up in the positive feeling around being or having been successful in their studies. Although the participants did not, in the majority, have any substantive advice, this is not to say they did not any advice for those returning to studies after a long absence.

When N.R. was asked how she would respond to someone that expresses their fear of returning she said, “So what? Do you know how long I was out of school? . . . just

look at me (meaning the individual should see her success in studying).” When asked how she would respond to someone that felt not ready to study, she stated, “I think not academically ready is always . . .not to worry, there are lots of people to help you. . . the first semester, that’s when you learn time management and the work . . .be ready ‘cause there is a lot of work.”

When asked to counsel someone who was fearful about being out of school for a long time, Q.C. abruptly said, “That has nothing to do with it. (You) stop thinking you can’t do it, and do it . . . stop talking and do it . . . you can do it if you want to do it.” “You tend to hear people . . . I mean I am not saying I never procrastinate . . . some people keep putting things off they should have been doing . . . (don’t be fearful) you can do it if you want to do it . . .stop making excuses. . .”

In terms of preparing for the return to the classroom, G.K. felt as others have that Second career provided the opportunity to correct error in choosing the wrong path in the first place. The up-front reflections should be to “think about something you have always wanted to do, always wanted to achieve, to study, to learn a bit about. . .” The preparation course then is to “do some research . . .some reading about it, it will get you into that set of mind, ready to – you know – it will get you to that next step . . .” Her feeling was that the mental preparation to form the right attitude was the most important first step. The entire undertaking then, “is not easy . . . it requires time, effort, motivation, and commitment. If you have those, And if you are willing to pursue that, everything in life takes sacrifice then go for it.”

Similarly, L.A., felt it all begins in advance when one asks themselves, “Is this really something you want to do, is there something you would like to do you haven’t done yet or that is in your mind you really want to do and you say ‘yes’ – there is your answer.” When asked what to do to prepare, she thought for a moment and said, “I really didn’t make myself ready, I wouldn’t tell anyone that . . . nothing prepares you for what you are going to go through . . . you just learn as you go . . . just stay focused . . . you find a way as time goes by.” With more reflection, she said there were those that may question what you are doing, “but don’t listen to those negative things . . . stay focused.”

A.S. took novel approaches to her new situation. She viewed her teachers as though they were supervisors in the workplace. In working for teachers or supervisors, one has to make adjustments and make an effort to get along. “[A]s an older student. . . (I can) get clarity and (work for) understanding and this is a skill I have learned. . . the 18 and 19 year olds don’t have that skill . . . (and it can result in uncomfortable, unproductive relations).”

When A.S. was asked how she prepared for her return to studies, she said, “[b]ack to school shopping! Seriously, you know what - back to school shopping was the best . . . you have to organize your semester . . . I was able to organize my semester before I even walked into the classroom . . . (she asked herself questions) do I want four binder for four course or just one. . . I had two binders for the four courses . . . I walked in knowing that I was ready, I was organized - already that gave me that positive start . . . I said (to myself) I’m ready, let’s go.”

A.S. quickly responded to question about how to adjust to being potentially the oldest in the class. She was asked what would be the best advice you would give to a mature adult for them to make the adjustments necessary to feel socially comfortable with younger students? Like the other participants, A.S. simply said, “Be yourself.”

#### **Summary of Chapter 4**

As described in the participant profiles and throughout the chapter, the main driver for each of the participants was to increase their employability by acquiring new skills with learning at a post-secondary level. The urgency to return to work varied depending on their unique financial circumstances, whether they were single or supporting dependants. Each participant displayed increased confidence in their abilities from the success they had achieved in their studies. This did vary in degree from those just starting their programs to those who were about to graduate, who displayed the high level of self-esteem. If the participants consider themselves lifelong learners, then the beginning of studies was easier but they too experienced increased confidence in their abilities to be successful learners. The possibility of further studies as mature adult was viewed as a real possibility and they would recommend further education to other mature adults in need of new or increased employability skills.

## **Chapter 5: Conclusions and Recommendations**

### **Introduction**

This chapter presents an overview and a reflection on the research process, the results of the interview responses that were categorized to address specific questions on the barriers experienced and the motivation strategies and actions taken by Second Career midlife adults to persist and to complete or partially complete their post-secondary academic programs. Academic success is dependent on the mature adult's ability to resolve the challenges of the external environment, such as (but not limited) to child or eldercare, by making adjustments to lifestyle and social commitments. The experiences of the mature adults, returning to formal education after a significant absence, reflect and support published research literature on the ability of older adults to successfully learn new skills throughout life.

### **Conclusions, Recommendations, and Reflections**

The purpose of this interpretative qualitative research was to explore the motivational factors, the challenges encountered, and the barriers that were overcome by the older returning student in order to persist in their respective programs. The researcher had some initial concerns that the age range of the over-40 volunteers would be skewed toward the younger ages. This proved not to be the case as there was an even spread of ages from 40 to 60 years. The participants represent a sample secured from one institution. The interviewees were all volunteers in that they were not convinced into participating; they came to the research willingly. This may in part explain the overall

positive feelings expressed by the participants toward the Second Career program, their return to and engagement with the studies. Happy people seem to want to share their experiences. They were all visibly and audibly grateful for the opportunity provided by the Second Career program. L.A. succinctly expressed the emotions felt by all the participants. She stated that when she received the news her application had been approved that, “I was happy; I am still happy.” Many said they had tears of joy when the approval came and this seemed to carry over into the studies.

With one exception, R.L. who had experienced unexpected eldercare issues, all the participants seem to have easily dealt with outside adjustments. Some had older or adult children who could care for themselves, in varying degrees, and who understood the importance of the study time requirements of their parent(s).

There were participants who were single and without children. Their major issue, financial concerns, were measurably relieved with the Second Career funds. Although the Second Career funds were far from generous, they were sufficient to lessen financial worries.

Attendance at various orientations to prepare the potential students for the academic experiences they would encounter and the Second Career information provided a positive introduction to college life and the beginning of their feeling at ease with their decision to return to studies. The mature students seeing there were many returning older adults significantly helped each individual to feel comfortable in their new role as post-secondary students. They were somewhat reassured they would not be the grey haired

oddity in the college if not the classroom. All the participants reported they felt like they were just another student and the potential distraction of feeling noticeably older than the majority soon disappeared. Some reported the positive comments by the younger students, regarding the courage to return to studies and that they were doing well in their work, which contributed to confidence and self-esteem building. Achieving specific grade targets on tests, assignments, and courses was similarly confidence building and a source of pride.

A relevant observation through the course of the interviews was that those individuals that formed a support network with classmates, either for academic purposes or for partly academic mostly social purposes, communicated more positive feelings about their acclimatization to college life and subsequent experiences. The women typically formed social/study groups rather quickly in each class and early in their programs. Either the male participants did not form a college support group or the support group was formed in-class on an ad hoc basis for specific tasks. These loose male associations seldom lasted for more than the length of an assignment or a few class periods. These gender related differences in forming associations or friendships are not unusual and have been reported in the literature (Caldwell, & Peplau, 1982; Ivancevich et al., 2008; Wicks, Freeman, Werhane, & Martin, 2010). Although the male participants did not feel the lack of an in-college support group had any effect on their socialization or interfered with their studies, one wonders if there were any negatives. In other words, would the workload seem easier to cope with had there been less independence and more camaraderie? The women were certain their groups provided emotional and social

support as well as facilitated their understanding of the study material and resultant achievements.

The women's ability to form support groups may have had another benefit. None of the female participants had felt any need to avail themselves of the college counselling services. Only one woman stated she had contacted the employment counselling office and two said they would be doing the same closer to the end of their program (for career advice). Two female participants said they had had funding issues that were quickly dealt with by either the college Second Career personnel or their contacts external to their programs. In contrast, the men stated they received all the support they needed from family or friends outside of the college. The men were less vocal about the outcomes, quality, or frequency of their psychological support than the women. The women reported that either receiving or giving support had improved their motivation, attitudes, and the quality of their post-secondary experiences.

All the participants directly or indirectly stated that an important element in feeling comfortable in a group of younger students was not to have the attitude they, the older learners, were different from the others. Some had commented that starting with the orientation sessions, and the manner in which the facilitators spoke, they felt they were now students. Student was the role and not the role of the older person in the class. This is not to say they completely forgot they were older. The reality would be clear at least on the first day and seeing all the younger students. The mature adult was not now in a group of older potential Second Career students as they had been in the orientation sessions. B.B. stated he was always the oldest in his classes but he adopted the attitude



that “we are all in this together . . .” hence, he was just another student. The actions and reactions of the younger students reinforced his role as just a fellow student.

The major challenge experienced by all the participants was the academic workload. All of the participants seem to have underestimated the amount to work that would be required. This was true for A.S. and R.J. (both females) who had previous college experience. B.B. (male), who not only had a post-secondary credential but also good background experience in his chosen field of studies, found the workload much higher and more challenging than he had anticipated<sup>39</sup>. Time management was a key factor for the participant’s academic success. Juggling a number of assignments that became due approximately at the same time, the challenges of group assignments (e.g., relying on others to do their contributions on time, sporadic communications), mid-terms and finals, the reading load, plus their outside commitments required on-going time management and organization. The participants reported that they had experienced or were aware that the workload changed from semester to semester, hence last term’s time management formula had to be readjusted in light of the new requirements.

For this researcher, the surprising feature of this study was that only two of the participants were able to offer substantive, practical advice for an older prospective learner. G.K. advised research and reading about one’s employment area. A.S. recommended analysis of reading material and note taking to prepare for studying. The remaining participants had suggested a wait and see attitude as everyone’s experience would be different.

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<sup>39</sup> Clarification: Each course had more content than expected and the combined workload made the learning challenging. B.B. has stated if each course was looked at in isolation, the material was not all that difficult.

Perhaps, one of the reasons for this meagre advice is that the Second Career application process requirement is that the future area of studies has to be researched in terms of its employment potential. This would require library, Internet research, a fair bit of reading, or information interviews with potential employers. The accumulated information would then have to be transferred to the program application. This might constitute preparatory work to improve study skills.

In the case of Centennial College's existing systems to assist the Second career student, all the participants agreed that they found the orientations and the information provided quite useful. Each participant felt they were as prepared as they could be from those services.

The college Second Career personnel believe the structure established is unique in the provincially funded college system, if not among all post-secondary institutions. This is not to say the system can do all that the college Second Career office personnel would like it to do. Due to budgetary reasons, the emphasis is on getting the new students off to a good start. There is not the staff to unravel complicated problems as well as maintaining the routine services. If there were emotional or personal outside issues presented, then the individual would be referred to the college counselling office. Similarly, academic or administrative issues would have to be fully handled by other existing support offices. All of these college services have a great to do and how quickly a Second Career student could get assistance to deal with their problems is undefined. Since the Second Career program began and the college office was established, no problem has been of such a magnitude the existing structures could not deal with it

effectively (Gail Derrington, personal communication, March 11, 2013). The few research participants that did seek information from the Second Career office gave it high praise for efficiently helping with their needs. The orientation sessions were organized and run by the same personnel hence the students' praise for those sessions accrues to the Second Career office. Provincial and for-profit colleges that do not have a central office to conduct Second Career information sessions and provide information, both written and oral, to prospective students would be well advised to institute or upgrade those services.

Although the research participant sample yielded good information, many questions remain and others have arisen. The sample, as mentioned earlier, was fully represented by volunteers. They all are grateful for the existence of the Second Career program and the learning undertaken. This raises some concerns regarding the findings. Morewedge (2012) reported on findings that a recall bias emerges with the passage of time as individuals exhibit "nostalgic preferences" (p. 6) with respect to their reported memories. Positive memories are better than they were and negative experiences fade. The participants in the research had either successfully completed their programs or were on the way to do so. There were reports of improved self-esteem and confidence reinforced by achieved target grades and social support. Given that the sample represents between 10 to 12% of the total Second Career students at one college, there are surely others whose experiences were not so positive (Gail Derrington, personal communication, March 11, 2013). This suggests the need for quantitative research to survey as much of the remaining population as possible. There may be individuals whose outside support

system is being tested to the limits and others that may have creative innovative solutions to personal challenges from which others could benefit.

Examining the stories of successful students reveals the strategies and tactics those individuals found useful for their situations. Investigating the challenges confronting those individuals that abandoned their studies would describe the barriers that proved insurmountable which then leads analysis and possible remedies. A mechanism would have to exist to collect that may be difficult to secure from discouraged individuals. If declining motivation was a drop out cause, the role of external encouragement, either from a social support network or outside agency can be analysed for ways to improve that support. This may rest with the efforts of the student to recognise the characteristics of the challenge and implement one of the previously supplied solutions. The adequacy and limits of the institution's role can be evaluated for potential improvement, if that is feasible under the given financial and ethical constraints.

Centennial College is a large college in the Greater Toronto Area (GTA). In fact, the majority of largest colleges in Ontario are in the GTA. Smaller colleges may not have the resources to relieve the barriers to persistence without other funding sources.

As the Second Career program is still relatively new and gone through changes, the success rate for graduates securing the desired employment in their areas of study has to be undertaken. The program approved courses and program and the employment opportunities were self-selected by the individuals. The quality of those choices need to be evaluated.

The participant reports on their life and academic experiences in this research study are in line with the literature on mature adult learners. The need to improve their employability and change their unemployed status was a strong motivator. This contrasts with those seeking personal enrichment or to broaden their current career options. These individuals' motivation(s) may be more relaxed. Participating in the Second Career Program did narrow the options for the choice of studies and that influenced the choice of post-secondary institution. Again, increasing employability in a demand career was the driver. Each participant had to assess their current situation, anticipate potential areas of conflict, and develop strategies and actions to first apply for the Second Career Program and then assume the responsibility for the academic workload.

Each participant had to overcome any existing situational barriers that would prevent them from enrolling in the college and academic program of their choice. Once they began the work, there were anticipated and unanticipated challenges that had to be overcome. The reality of being with younger learners, coping with the formalities of the institution, and the academic workload called for additional personal coping strategies and accommodations. On-going family and social life adjustments had to be made. Emotional and more direct physical assistance had to be secured so that they could persist in their studies. Although these factors varied in difficulty individual to individual, none of those barriers were insurmountable.

The wide range of ages supports the literature findings that learning can continue through the midlife years if the inhibiting barriers can be minimized and the motivation is strong enough. Regardless of the state of academic preparedness of any given participant,

each individual was willing to make a best effort to be successful. In each case, their self-image improved to the point that continuing formal learning after graduation was not viewed as improbable or impossible. The increase in self-confidence of each participant gained from their academic success, as they measured it, is one of the additional benefits of learning reported in the literature.

## **Epilogue**

The main interest of this researcher was motivations and challenges of the older learner returning to post-secondary education. As this is a broad topic, a focus on Second Career students was selected. This refinement brought a commonality of interests and motivations of the various older learners that chose to participate in the research. The interpretative, qualitative research was approached with an open mind, as it should be. Nonetheless, there were surprises.

The reported ease with which the participants assimilated into the social fabric was one such surprise. The older age of the Second Career students disappeared as a concern, if it ever was one. It did not become an attitudinal barrier.

The multi-generational classroom implies there is a wide range of personal histories. What is poorly remembered history from a book or folklore for one generation is what another lived through and remembers well. There would seem to be little common ground for meaningful conversation. Yet, it seems that, at least during class time, the age differences disappeared as barriers to conversation and co-operation. If one believes that post-secondary education come in two parts, one from a textbook and one

part from the exposure to new ideas generated by your colleagues, then socialization is an important part of the learning experience. The research participants seem to have been equally successful at learning from their fellows as they were from their textbooks.

The participant's lack of insecurity regarding their ability to learn contributed to their success. None of the participants bought into the myth that at some point one is too old to learn. Confidence in their abilities was fortified by their increasing academic success. Some had dreams of more learning. Whether they pursue that dream or not we may never know. The important part is they have that dream.

At least at one college, the existing one-size-fits-all support and service structures have been up to the challenge of a multigenerational student population. Granted one could argue that the more mature person has been through a fair number of life challenges and has a reservoir of experiences and solutions to draw upon to be more self-sufficient than younger learners.

Regardless of age, life has its problems and we may not be able to deal with them all with great facility. The outside help is there, it can be used, and it can produce positive results. The positive attitudes of the older learners were refreshing. The optimism and willingness to take on new challenges was inspiring to witness. If one earnestly wishes to learn and the opportunity presents itself, age alone is not a barrier to success.

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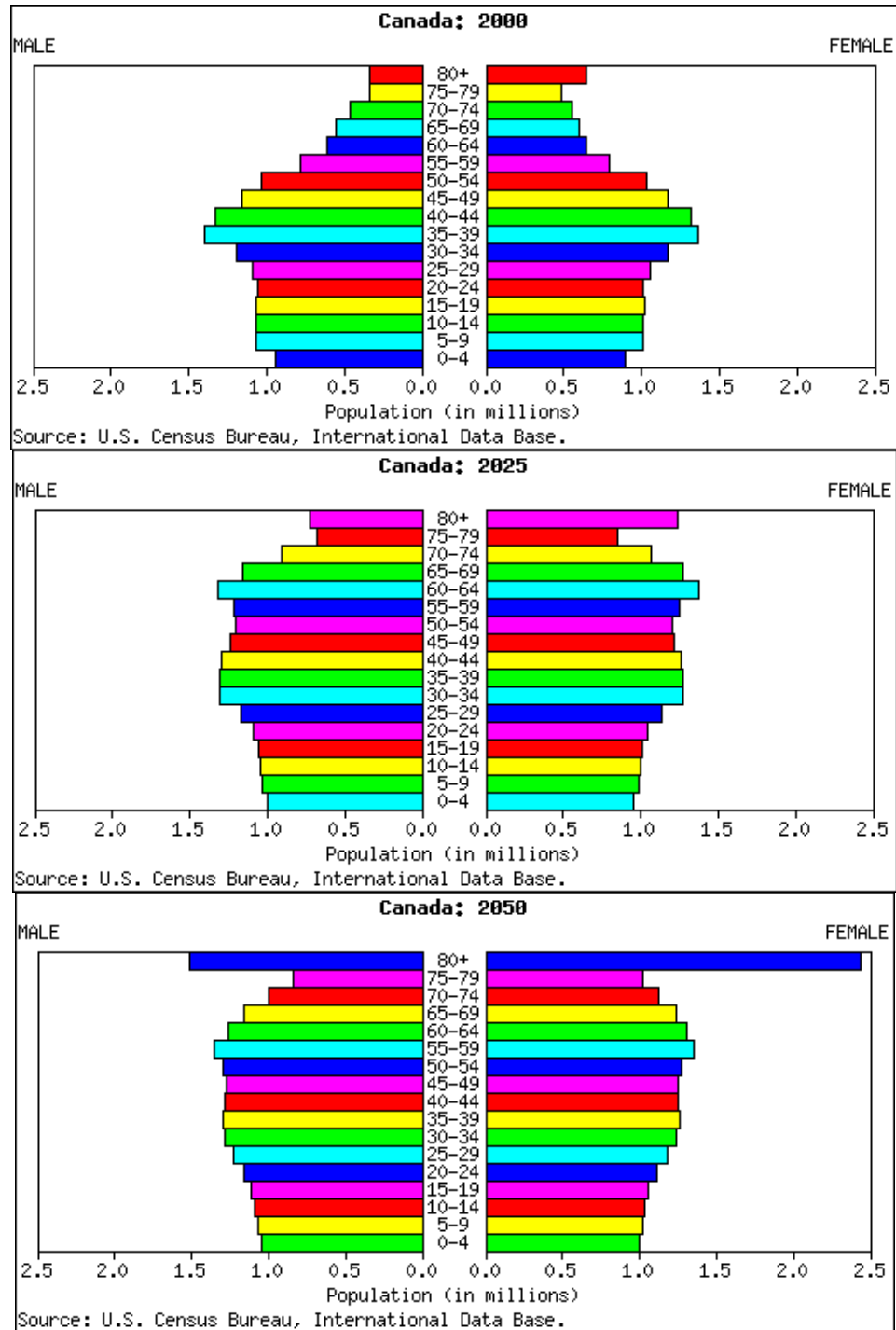
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## Appendix 1: Population Pyramid Summary for Canada



(Source: University of Western Ontario, 2011)

## Appendix 2: Centennial College's Second Career Flyer/Poster

See where experience takes you.

# Out of Work?

If you've been laid-off, you could be eligible for the **Second Career** Strategy!

To find out how to apply to Centennial College through Second Career, please call the **Employment Training Centre** at 416 289-5123 or email us at [employmenttraining@centennialcollege.ca](mailto:employmenttraining@centennialcollege.ca)

**We are still accepting applications for Fall 2013 \***

Centennial offers a range of programs for careers that are in demand, including: business, communication arts, community services, engineering, health sciences, hospitality and transportation.

Some programs offer hands-on training.

To check if you are eligible for **Second Career**, please call Employment Ontario at 1-800-387-5656.

We look forward to assisting you on your academic journey through **Second Career**!

***Second Career** is a provincial initiative to assist those in need, who have been laid off as of January 2005. The Ministry is providing funding to train/upgrade at community and private colleges. **Second Career** provides up to \$28,000 for tuition, books, other instructional costs and transportation.*

\* If you are interested in September 2013, keep in mind that Second Career is time-sensitive. You must contact us immediately for your next steps.

**Employment Training Centre, Centennial College**  
Phone: 416-289-5123 • E-mail: [employmenttraining@centennialcollege.ca](mailto:employmenttraining@centennialcollege.ca)  
[www.centennialcollege.ca/secondcareer](http://www.centennialcollege.ca/secondcareer)

CENTENNIAL COLLEGE



### **Appendix 3: Informed Consent Form**

#### ***Investigation of the Persistence Factors and Barriers Experienced by Mid-life Learners Returning to Post-secondary Education***

##### **1. Researcher: John D. Mc Manus**

You are invited to take part in a research project entitled: “Investigation of the Persistence Factors and Barriers Experienced by Mid-life Learners Returning to Post-secondary Education.”

This form is part of the process of informed consent. It should give you the basic idea of what the research is about and what your participation will involve. It also describes your right to withdraw from the study at any time. In order to decide whether you wish to participate in this research study, you should understand enough about its risks and benefits to be able to make an informed decision. This is the informed consent process. Take time to read this carefully and to understand the information given to you. Please contact the researcher, John McManus, if you have any questions about the study or for more information not included here before you consent.

It is entirely up to you to decide whether to take part in this research. If you choose not to take part in this research or if you decide to withdraw from the research once it has started, there will be no negative consequences for you, now or in the future.

The proposal for this research has been reviewed by the Interdisciplinary Committee on Ethics in Human Research and found to be in compliance with Memorial University’s ethics policy. If you have ethical concerns about the research (such as the way you have been treated or your rights as a participant), you may contact the Chairperson of the ICEHR at [icehr@mun.ca](mailto:icehr@mun.ca) or by telephone at 709-864-2861.

##### **2. Introduction and Purpose of the Study**

I, John D Mc Manus, am a graduate student, Memorial University of Newfoundland, Faculty of Education. As part of my Master’s thesis, I am conducting research under the supervision of Dale Kirby, Ph. D. (Memorial University of Newfoundland, Faculty of Education). The purpose of the research is to investigate the barriers and motivation of mature adults as first time enrollees or as those returning to post-secondary studies.

The purpose of the research is to reveal specific barriers and needed support services that would address persistence and completion issues unique to the older learner. Post-secondary institutions may use the research to add or adjust support services to facilitate mature learner’s persistence and successful completion of their studies. For the mature

learner, the findings could permit them to be better prepared to deal with internal and external factors not previously considered, or underestimated, in order to be successful.

The initial use of the research, for the researcher, is the completion of one of the requirements for the degree, Master of Education, Post-secondary Studies.

### **3. Length of time:**

Memorial University of Newfoundland requires the data collected to be available for inspection for five years.

### **4. Withdrawal from the study:**

You, the participant, are free to withdraw from the research at any time and all notes related to your interview would be surrendered to you.

### **5. Possible benefits:**

As a participant, involvement in a research project experience will be a learning opportunity. There can be enriching insights gained for specific events and the academic journey can be seen from an overview perspective. Your contribution may assist others in similar situations in their academic pursuits. Post-secondary institutions may also benefit (See above: Introduction and Purpose of the Study).

### **6. Possible risks:**

There is a potential risk of emotional discomfort in indirectly stimulating memories of periods of unemployment. It is not the purpose of the research to bring out or review those experiences, but general recollections could cause one to relive those times.

### **7. Confidentiality vs. Anonymity**

The data collected will be kept confidential by the researcher and no other person, other than the participant, would have access. For purposes of organization and reference, the data would be coded with contrived initials. Any other descriptions, such as age, gender, occupation (if relevant) would be minimal and limited.

### **8. Confidentiality and Storage of Data**

Data stored on a computer will be password protected. After the research is complete, all original data would be stored by the researcher in memory stick (USB) and kept in a safety deposit box for the required period. Eventually, the original data on the memory stick would be deleted. (Data storage would conform to Sections 3 and 7.) No data would be stored online or with a third party.

## **Recording of Data, Reporting of Results, and Sharing of Results**

The interviews may be audio recorded to ensure accurate collection of data. Direct quotations will be used, if necessary, in the production of the thesis. The true identity of the participants will not be revealed in the thesis or subsequent publications. Participants would not have access to other participants' information or interview responses, except those published in the thesis (See Sections 3, 7, and 8).

### **Questions:**

You are welcome to ask questions at any time during your participation in this research. If you would like more information about this study, now or after completion, please contact:

John D Mc Manus, e-mail: [jmcma11@my.centennialcollege.ca](mailto:jmcma11@my.centennialcollege.ca) or my thesis supervisor:  
Prof. Dale Kirby, Ph.D. e-mail: [dkirby@mun.ca](mailto:dkirby@mun.ca)

### **Participant's Consent:**

I have read and understood what this study is about and appreciate the risks and benefits. I have had adequate time to think about this and had the opportunity to ask questions and my questions have been answered.

- ☐ I agree to participate in the research project understanding the risks and contributions of my participation, that my participation is voluntary, and that I may end my participation at any time.
- ☐ I agree to be audio-recorded during the interview
- ☐ I agree to the use of quotations but do not want my name to be identified in any publications resulting from this study.

A copy of this Informed Consent Form has been given to me for my records.

\_\_\_\_\_  
**Signature of Participant**

\_\_\_\_\_  
Date

### **Researcher's Signature:**

I have explained this study to the best of my ability. I invited questions and gave answers. I believe that the participant fully understands what is involved in being in the study, any potential risks of the study and that he or she has freely chosen to be in the study.

\_\_\_\_\_  
Signature of Principal Investigator

\_\_\_\_\_  
Date

## Appendix 4: Ethics Review Approval Letters



### Interdisciplinary Committee on Ethics in Human Research (ICEHR)

Office of Research - IIC2010C  
St. John's, NL, Canada A1C 5S7  
Tel: 709 864-2561 Fax: 709 864-4612  
[www.mun.ca/research](http://www.mun.ca/research)

ICEHR Number:	20131695-ED
Approval Period:	March 28, 2013 – March 31, 2014
Funding Source:	
Responsible Faculty:	Dr. Dale Kirby Faculty of Education
Title of Project:	<i>Investigation of Persistence Factors and Barriers Experienced by Mid-life Learners Returning to Postsecondary Education</i>

March 28, 2013

Mr. John Mc Manus  
Faculty of Education  
Memorial University of Newfoundland

Dear Mr. Mc Manus:

Thank you for your email correspondence of March 25, 2013 addressing the issues raised by the Interdisciplinary Committee on Ethics in Human Research (ICEHR) concerning the above-named research project.

The ICEHR has re-examined the proposal with the clarification and revisions submitted and is satisfied that the concerns raised by the Committee have been adequately addressed. In accordance with the *Tri-Council Policy Statement on Ethical Conduct for Research Involving Humans (TCPS2)*, the project has been granted *full ethics clearance* to March 31, 2014.

Once obtained, please provide a copy of the approval from the Centennial College REB.

If you intend to make changes during the course of the project which may give rise to ethical concerns, please forward a description of these changes to Theresa Heath at [icehr@mun.ca](mailto:icehr@mun.ca) for the Committee's consideration.

The *TCPS2* requires that you submit an annual status report on your project to the ICEHR, should the research carry on beyond March 31, 2014. Also to comply with the *TCPS2*, please notify us upon completion of your project.

We wish you success with your research.

Yours sincerely,

Gail Wideman, Ph.D.  
Vice-Chair, Interdisciplinary Committee on  
Ethics in Human Research

GW/th

copy: Supervisor – Dr. Dale Kirby, Faculty of Education

Associate Dean, Graduate Programs, Faculty of Education

Mr. John McManus  
Professor, School of Business,  
Centennial College

April 12, 2013

**REB application # 165: Investigation of Persistence Factors and Barriers Experienced by Mid-life Learners Returning to Post-secondary Education**

Dear John;

The Centennial College Research Ethics Board involving Human Subjects has reviewed your ethics review application and documentation and grants approval for the above-named study. The approval is based on the following:

- 1) The Centennial REB must be informed of any protocol modifications as they arise
- 2) Any unanticipated problems that increase risk to the participants must be reported immediately
- 3) You have one year approval for the study: if needed, an annual renewal form will be required at that time
- 4) A study completion form is submitted upon completion of the project.

These forms can be downloaded from the Centennial College ethics website:

<http://www.centennialcollege.ca/applied/ethics/submitapplication>

On behalf of the committee at Centennial, I'd like to wish you every success with your project.

Sincerely,



Lynda Attack, R.N., Ph.D  
Chair  
Research Ethics Board involving Human Subjects  
Centennial College  
Email: [latack@centennialcollege.ca](mailto:latack@centennialcollege.ca)  
Tel: 416. 289-5000 x 4003

## **Appendix 5: e-mail script for contacting prospective research participants**

Greetings,

I am a graduate student with Memorial University of Newfoundland in the Faculty of Education. As part of my Master's thesis, I am conducting supervised research for the purpose identifying the barriers experienced and motivations useful for mature adult students. The focus is on those who have been away from formal studies for a long time and are first time enrollees or those returning to post-secondary studies.

The research is to reveal specific barriers and needed support services that would address persistence and completion issues unique to the older learner. Post-secondary institutions may use the research to add or adjust support services to facilitate learner's persistence and successful completion of their studies. For future mature learner, the findings could permit them to be better prepared to deal with internal and external factors not previously considered, or underestimated, in order to be successful.

The research would involve an interview(s) of approximately two hours in length. The time scheduled for the interviews would be at our mutual convenience. The interview location would be at the college. No special preparation is required on your part, although you may wish to mentally review your experiences in light of the above information.

If you wish to participate in this research, and I would be pleased if you would, contact me via the provided e-mail address. Please indicate and alternate means and time you can be contacted. If you have any questions or concerns, do not hesitate to communicate those to me as soon as they arise.

Sincerely,

John D Mc Manus