

2015-02-03

"Live and Learn": Journey of Lifelong Learning of Retired Older Adults in Contemporary China

Shan, Wei

Shan, W. (2015). "Live and Learn": Journey of Lifelong Learning of Retired Older Adults in Contemporary China (Master's thesis, University of Calgary, Calgary, Canada). Retrieved from <https://prism.ucalgary.ca>. doi:10.11575/PRISM/26774

<http://hdl.handle.net/11023/2069>

Downloaded from PRISM Repository, University of Calgary

UNIVERSITY OF CALGARY

“Live and Learn”: Journey of Lifelong Learning of Retired Older Adults in Contemporary China

by

Wei Shan

A THESIS

SUBMITTED TO THE FACULTY OF GRADUATE STUDIES
IN PARTIAL FULFILMENT OF THE REQUIREMENTS FOR THE
DEGREE OF MASTER OF ARTS

GRADUATE PROGRAM IN EDUCATIONAL RESEARCH

CALGARY, ALBERTA

JANUARY, 2015

© Wei Shan 2015

Abstract

This research examines the role of lifelong learning in facilitating successful aging among Chinese older adults. A life history research is adopted to conduct the study. By analyzing narratives of four research participants' learning stories, the study explores the provision of lifelong learning programs, Chinese perspectives on successful aging, and contributions of lifelong learning to successful aging and active citizenship among Chinese retired older adults. The study shows that the Chinese perspective on successful aging is closely connected to Chinese culture and traditions. Learning contributes to successful aging by bringing out older adults who are healthier, independent, open-minded and socially active. The rich descriptions of historical and political events, Chinese traditions, moralities and social values, contribute to the understanding of Chinese older adults' pursuit of lifelong learning and perspectives on successful aging. The detailed discussion of the motives and activities of older adults volunteering advances our extant knowledge about Chinese older adults' volunteerism.

Acknowledgements

My greatest and sincerest thanks to my supervisor, Dr. Shibao, Guo, for guiding me through the whole process of this study. I would never have been able to finish this project without his investment of a lot of time discussing details of my study, giving me ideas and maintaining strict deadlines. My thanks also go to the research participants who were willing to share their lifelong learning experiences and perspectives with me and invite me into their lives. Finally, to all my friends who questioned certain ideas in my research and to those who shared with me their opinions about the research, thank you.

Dedication

This study is dedicated to my loving parents, who encouraged, supported and pushed me through the whole research process. Also, to myself, for the efforts I made through hard times and the achievement I accomplished in writing up this research in English.

Table of Contents

Abstract.....	ii
Acknowledgements.....	iii
Dedication.....	iv
Table of Contents.....	v
CHAPTER ONE: INTRODUCTION.....	1
1.1 The Aging Population.....	1
1.2 Identifying the Problem.....	6
1.3 Purpose of the Study and Research Questions.....	9
1.4 Significance of the Study.....	10
1.5 Limitation.....	11
1.6 Organization of the Thesis.....	13
CHAPTER TWO: LITERATURE REVIEW.....	14
2.1 Research on Aging and Related Issues.....	14
2.1.1 Successful aging.....	14
2.1.2 Aging and health.....	15
2.1.3 Aging and financial security.....	17
2.1.4 Aging and physical activities.....	17
2.1.5 Aging and learning.....	18
2.2 Lifelong Learning.....	19
2.2.1 Four pillars of lifelong learning.....	20
2.2.2 Critiques of lifelong learning.....	24
2.3 Older Adults and Their Learning.....	25
2.3.1 Older adults' learning and senescent.....	25
2.3.2 Benefits of learning for older adults.....	26
2.3.3 Older adult learning theories.....	27
2.4 Confucianist Tradition of Learning in China.....	31
2.5 Older Adult Learning in Contemporary China.....	34
CHAPTER THREE: METHODOLOGY.....	42
3.1 Why Qualitative Study?.....	42
3.2 Social Constructivist Worldview.....	43
3.3 Research Methodology.....	43
3.3.1 The narrative approach.....	45
3.3.2 The life history.....	47
3.4 Interview.....	48
3.5 Ethics Considerations.....	50
3.6 Research Settings.....	51
3.6.1 Participants.....	51
3.6.2 Locating the institution.....	53
3.6.3 Gaining access to the institution.....	54
3.6.4 Data collection.....	54
3.6.5 Data analysis.....	56
3.7 Issues of Trustworthiness.....	57

3.8 Reflexivity	58
3.9 The Role of Researcher.....	59
CHAPTER FOUR: MEETING THE PARTICIPANTS.....	61
4.1 Mr. A.....	61
4.2 Ms. B.....	67
4.3 Ms. C.....	72
4.4 Ms. D	78
CHAPTER FIVE: SUCCESSFUL AGING AND LIFELONG LEARNING.....	85
5.1 Chinese Older Adults' Perspectives on Successful Aging	85
5.1.1 Physical and psychological health.....	85
5.1.2 The joy of social engagement.....	87
5.1.3 Learning to live independently.....	89
5.2 Lifelong Learning Programs and Activities.....	91
5.2.1 Learning motivations.....	91
5.2.2 The programs and activities.....	93
5.2.3 Professional teachers	94
5.3 Contributions of Lifelong Learning to Successful Aging.....	96
5.3.1 Being more confident and in control of life through self-development	96
5.3.2 Expanded horizon by learning.....	97
5.3.3 Recognition of self-value and contribution	100
5.4 Active citizenship	102
CHAPTER SIX: DISCUSSION AND CONCLUSION.....	107
6.1 Features of Chinese Perspectives on Successful Aging.....	107
6.2 Provision for Older Adult Learning.....	111
6.3 Emphasizing Lifelong Learning among Chinese Older Adults.....	117
6.4 Contribution.....	119
6.5 Limitations	122
6.6 Recommendation for Future Study.....	124
6.7 Conclusion	125
APPENDIX A: RECRUITMENT LETTER (ENGLISH).....	158
APPENDIX B: RECRUITMENT LETTER (CHINESE)	160
APPENDIX C: CONSENT FORM (ENGLISH)	162
APPENDIX D: CONSENT FORM (CHINESE)	168
APPENDIX E: INTERVIEW THEMES WITH GENERAL QUESTIONS (ENGLISH).....	172
APPENDIX F: INTERVIEW THEMES WITH GENERAL QUESTIONS (CHINESE).....	174

Chapter One: **Introduction**

Aging is natural and inevitable for every human being. It is accompanied by physical and psychological changes such as slow reaction times, memory loss, and greater dependency on others. Some retirees find it hard to adjust to a “new phase of life,” which causes stress, frustration, and in some cases major depression among older adults (Egede, 2007). However, there are retired older adults who seek opportunities to enrich their retired life. They lead a more active life style by paying attention to physical exercise, mental stimulation, actively connecting to others (European Senior Citizens Union, 2003). These older adults are eager to explore new possibilities in life by learning new skills, making new friends, and visiting new places. They challenge themselves in retired life and find self-fulfillment as a consequence of acquiring a new skill, helping others, and getting recognition from their peers. They enjoy retired life more than when they were at work, which is a strong indication for adding years to life.

In reality, retired older adults’ life situation varies in different countries with distinct cultural backgrounds and social value standards. This research will explore how retired older adults cope with aging in China and how lifelong learning experiences facilitate a smoother transition into retirement.

1.1 The Aging Population

Like other countries, China faces the challenges presented by its aging population. As the fourth largest country in the world in geographic area, China tops the world with a huge population of 1.39 billion people, which accounts for 19.3% of the world population (World Population Statistics, 2014). China is also home to one fifth of the world’s aging population, a huge burden on its economy. In terms of international standards, if 10% of the population of a country is 60 or over, or 7% is 65 or over, it is considered an aging country (Cheng, 2002). By the end of 2004, Chinese people aged 65 and above represented about 7.6% of the total

population, and by 2011 13.7% of the total population were in their 60s or older (China Net, 2008; Xin Hua Net, 2006; Yokomak, 2009). So China is already an aging country and its aging process started in 1999 (CTC, 2004). According to China Report of the Development on Aging Career (2013), by 2013 the number of adults who were older than 60 years old reached 200 million. In 2014, the number will reach an estimated 203 million and the number will keep growing at a fast rate to reach 400 million by 2040 (Xinhua Net, 2011), reaching its peak by 2050 (SZ News, 2010).

We should also look at China's population problem in terms of its specific historical background. In the past 30 years, the Chinese government has continually been coping with the population problem. After the establishment of the People's Republic of China in 1949, Chairman Mao Zedong was optimistic that China would be economically stronger than countries such as the UK and the US through rapid industrial development. He also believed that collective work was the most effective way of achieving this goal. Thus, families were encouraged to have more children for the future labour force and the country experienced a "baby boom" during this period. The birth rate showed that there were on average six children in each Chinese family (Bergaglio, 2001). Unfortunately, China went through "the Great Leap Forward," which was a social and economic campaign led by Mao Zedong, aiming to transform the country from an agrarian economy to a communist society through rapid industrialization and collectivization. It proved to be a huge mistake in decision-making and the campaign caused three years of famine from 1958 to 1961. During that period, the fertility rate declined and the death rate increased tremendously. Afterwards, the country gradually recovered from this tragedy and normal birth and death rates were restored. Then, in 1963, another population surge occurred as if to compensate for the loss during the famine period.

The Chinese government faced heavy pressure in terms of health care, pensions and education due to the weak economy and large population. In order to bring about economic reform and improve the living standard of the people, in 1979 the Chinese government introduced the One Child Policy (Deutsch, 2006; Hesketh et al., 2005), which aims to reduce family size. It was strictly enforced on urban residents and government employees (Hesketh et al., 2005). People had to legally register new-born babies in the household, referred to as having a “*hukou*” so that the baby will be entitled to enjoy relevant benefits once employed in the city (Cooney & Li, 1994). The policy has been in effect for years, greatly reducing the population. According to a demographic census, the birth rate was only 0.6% from 2000 to 2010. Additionally, the booming economy in China has changed people’s life perspectives. In the cities, for instance, the younger generation prefers not to have children due to the high expense of raising a child. Instead, they would rather spend time and money on personal development, such as career, education and leisure activities. In responding to the situation, there will be a ratio of two elders for every child by 2035 (Jackson et al., 2008). The population in China is getting older fast.

Many western countries define older adults by a chronological age of 65, while the UN defines older adults as people who are older than 60 years. In developed countries, life stages are usually marked by chronological age, but in many developing countries, old age begins when it is not possible for one to make an active contribution to society (Gorman, 1999). As Thane (1978) mentioned, the definition of ‘older adult’ is linked to the retirement age. For women, it is between the ages of 45 and 55, and for men it is between 55 and 75 years of age. In China, older adults are those aged 60 and above. The legal retirement age is 60 for men and 55 for women. However, in many cases, people retire earlier than the legal retirement age. As a consequence,

China has experienced a surge in the population of retirees beginning in 2013. Currently, the ratio of the total retirement population to the working population is 19:100; by 2030, the ratio will be 40:100, and 64:100 by 2050, which places a greater burden on an already discouraging situation.

Being old will also bring moral issues or even disputes, given the traditional Chinese cultural background. Chinese people have inherited from Confucius' ideal that children are obliged to take care of their parents when parents get old (Deutsch, 2006). Accordingly, older adults would rather live with their children than go to nursing homes when they are no longer able to take care of themselves. However, in modern society this preference can cause problems for the younger generation. Due to the One Child policy, when two people who are the only child in their own families get married, they would have the responsibility of taking care of two parents and even the grandparents – up to eight older adults who will need constant care and attention, not only in physical aspects of life but also mental and psychological aspects, which are often neglected by many inexperienced couples. Faced with high pressure in their own life in terms of career, marriage, and health, etc., the younger generation becomes unwillingly incompetent to fulfill their filial duties. This could lead to various problems that need costly solutions. Nowadays, older adults' life situation has become a hot topic in newspaper reports, talk shows, and even TV series. A number of questions have been raised: How can one live a happy and healthy life while getting old? What is the appropriate amount of care and attention from offspring? What is the meaning of retired life and the value of retired people?

The Chinese government has been taking different measures in regard to the above situation, including increased investment in the pension and welfare projects for older adults so that they can have a financially secure life after retirement. The government has also put effort

into training social workers who can take care of older adults who are in need. In 2004, the Chinese government paid 350 billion RMB for pension plans and 86 billion RMB were spent on basic health care (CTC, 2004). From 2009 to 2011, 170 billion RMB have been invested in endowment insurance (Beijing Daily, 2012). In the meantime, the government encourages investment in and development of all types of older adults services, including nursing homes, older adult apartments, and well-established older adult communities. There are exhibitions focusing on successful aging which encourage retired older adults to enrol in older adult universities or go travelling in groups. Unfortunately, taking into account its large population and weak economic foundation, China is still far behind its developed foreign counterparts in investment in older adult care facilities, education opportunities and public awareness. For example, in some developed countries, there are on average fifty to seventy beds available in senior citizen care centres for every thousand older adults, while there are only 8.6 beds available for every thousand older adults in China. Overall, reinforcement of the old-age security mechanism must be an endeavour that requires much time and collective contributions from the whole society.

Apart from the economic investment, the Chinese government has also applied some strategies and policies to encourage older adults for healthy and active aging. “Live and learn” is a well-known saying in China; it means that individual can always learn something new in their life; learning comes with living. Confucius, who was born 551 B.C. and died in B.C 479, is considered the earliest educator to advocate lifelong learning, and he also asserted that purposes of learning vary in different life stages. Confucius himself was a practitioner of lifelong learning himself. Due to the strong Confucianism learning tradition, many retired older adults keep seeking opportunities to improve themselves by learning, as noted by Jarvis (2006), who stated

that learning is intrinsic to living, being and becoming. As a result, different types of learning organizations have been established: older adult recreational and learning centres, community colleges and universities that aim to satisfy different learning needs. So far, more than 32,000 universities for older adults have been registered by the China Association of Universities for the Aged, which is a national, non-profit organization in this country. Altogether, more than 3.3 million students have enrolled and this number will rise in the years to come. Chinese older adults have realized that their retired life can be happier and more meaningful by making new friends, fostering new interests, or just enjoying new and entertaining activities. This helps them rediscover their value to the people around them, to society and, most importantly, to themselves. Some retired older adults would like to be reemployed for economic and obligation reasons, as well as to experience self-achievement (Wang, 2001). All these positive activities and perspectives demonstrate efforts and determination toward healthy and meaningful aging for Chinese older adults.

1.2 Identifying the Problem

Based on the global and national situation in China, it seems clear that an aging society has a number of problems concerning economic, medical and social issues. Dependency of older adults on others (Bloom et al., 2011) can result in low self-esteem and loneliness results in mental depression. An inactive lifestyle can cause physical and psychological illness. The medical care expenses for the elderly is 20% of the national income for OECD countries (Bali & Asher, 2012). It is estimated that the health and pension expenditure for an individual aged 65 and above is 4.8 times higher than expenditure for individual younger than 65 (Takayama, 2010). In this case, building an efficient benefit system for older adults has become one of the top priorities. On the other hand, the government needs to promote the idea of pursuing an active life

style for retired older adults, who should be encouraged to exercise their body and mind frequently in order to avoid experiencing chronic illnesses.

It is not uncommon for a negative image of older adults as “takers” to be presented (Findsen, 2005) because of exaggeration or over-exposure of their personal life by the public media, especially regarding those from low-income families. Sometimes even the regular report regarding their receiving support from the government has an unexpected side effect in that they are not only considered disadvantaged groups but also discriminated against by mainstream society. It is essential to present the positive side of older adults’ lives. The public should know more about older adults, such as what takes up most of their time, in what ways they are still making a valuable contribution to society, and how much they are eager to achieve self-fulfillment and remain active citizens.

Human beings need to keep learning throughout our lives to develop our identity. Learning can help retired older adults adjust to their new role and life pattern and embrace changes and losses in this later stage of life (Fok, 2010). Today older adults have started to demonstrate an interest in continuing or returning to learning designed for self-fulfillment and the pursuit of leisure; such learning can nourish the brain and keeps the mind active (Williamson, 1997), and it also provides multiple benefits for older adults, such as physical improvement, increased confidence, self-esteem, and increased social contacts and improved relationships (Aldridge & Lavender, 2000; Antonucci & Akiyama, 1991; Andrews, Clark & Luszcz, 2002; Dench & Regan, 2000; Swandell, 1999). Every society needs their citizens to remain active and positive for both democratic and development reasons (Jarvis, 2008) and it requires its citizens to keep learning no matter how old they are. As a consequence, the concept of lifelong learning has

been largely adopted in the world, especially for reducing the impact of old age on aging societies.

Lifelong learning is ongoing, voluntary, and self-motivated (Department of Education and Science, 2000). It is the pursuit of knowledge for either personal or professional reasons. Therefore, it not only enhances social inclusion, active citizenship and personal development, but also competitiveness and employability (Commission of the European Communities, 2006). It is never too late to learn. In other words, learning doesn't necessarily occur during one specific period of time; instead, people live and learn, which means that as long as you live, you can always learn something new, demonstrating that learning is a lifelong project. To pursue lifelong learning is considered one of the human rights that people deserve in a democratic society (Findsen, 2012). Learning makes life-phase transition smoother and contributes to building personal identity. It provides retired older adults opportunities to meet new friends and find those with common interests. The benefit of studying with peers is that by peer recognition and sharing of knowledge, skills and expertise, learners embrace a sense of belonging, which is one of the essential elements of self-identification. The pleasure of interaction with like-minded peers is beyond description (Wenger, McDermott & Snyder, 2002). Another benefit is that learning contributes to easy transition to the Third Age and retirement (Martin, 2000). It is natural and spontaneous that retirees tend to think more about issues such as the meaning of life, past achievements, and the future. Thus they embark on a journey of exploration and self-reflection with the hope of finding the answers to these questions, which in turn helps them know themselves better and face reality with more confidence. Moody (1976) asserts that the true value of learning for older people lies in challenging learners to search and explore their growth and development. Baltes and Baltes (1990) pointed out in their lifespan development theory that

people have the capacity to learn, adapt, develop, make choices and remain in control of their lives into old age. It explains why learning is considered powerful in facilitating successful aging among retired older adults.

1.3 Purpose of the Study and Research Questions

Facing the challenges of an aging population, researchers try to find links between older adult learning and successful aging (Kops & Sloane-Seale, 2010), bearing in mind that learning and successful aging have different manifestations due to the different social, economic, and cultural characteristics of different countries. Jarvis (2012) argued that learning style and activities would vary greatly for older adults depending on specific personalities and the cultural and social context. In this research, the context of an aging society and lifelong learning is based on contemporary China. In Chinese culture, many people give top priority to learning. Confucius, one of the greatest thinkers and educators, illustrated the importance of learning and its functions in moulding individuals and creating harmonious societies. He also advocated equal learning opportunities for all individuals. Although there is a strong familiarity and affiliation with lifelong learning among Chinese people, greater efforts are required to facilitate lifelong learning in China.

First of all, under globalization lifelong learning has become a tool for the power groups to achieve more economic benefits. As a result, the learning turns out to be largely occupationally oriented (Findsen, 2012; Jarvis, 2008) and focused on young people rather than older adults, which creates inequality. Secondly, China's large population and national territory render it almost impossible to implement basic education for all citizens, let alone the concept of lifelong learning. Thirdly, as a developing country, China has an uneven distribution of wealth due to its weak economy, which indicates unequal opportunities for participating in lifelong learning among its citizens. Rich people with high social status have an advantage over others.

Lastly, the need for learning is in the human genes; “it is the single most significant element moulding our being” (Guo, 2010, p. 207), an idea which many Chinese are unaware of due to the rigid exam-oriented approach to education.

Though facing challenges in facilitating lifelong learning in China, there are still pioneers among retired older adults who demonstrate the benefits of being lifelong learners. This study aims to examine the role of lifelong learning in facilitating successful aging of retired older adults in China, with a focus on perspectives of older adults on successful aging, provision of lifelong learning programs for older adults, and contributions of lifelong learning to healthy aging and active citizenship. The main question posed by this study is: What is the role of lifelong learning as a mediating force in facilitating successful aging and active citizenship of retired older adults in China? Moreover, this main question is supported by a series ancillary questions including:

1. How do older adults perceive successful aging?
2. What attracts older adults to lifelong learning activities and programs?
3. What are the contributions of lifelong learning to successful aging?
4. How does lifelong learning foster active citizenship and positive changes in identity, self-esteem, value, attitude and social role for learning participants?

1.4 Significance of the Study

This study aims to explore retired older adult learning within China’s social context. It examines implementation and acceptance of lifelong learning among older adults in mainland China. It also compares similarities and differences between the traditional Confucian education concept and modern lifelong learning. Through narratives of participants in this research, the experience of retirement before and after participating in learning activities is presented and the role of lifelong learning in facilitating easy and successful aging is revealed. Finally, this study

presents older adults' perspectives on how to deal with bias towards them. In general, an overall visualization of the older adults' life in mainland China is created, wherein the study explains retired older adults' eagerness to pursue learning and how a positive attitude and perspective on lifelong learning is established. Further, the findings of the thesis will largely support the existing literature regarding the benefits, learning program preferences, level of satisfaction and suggestions about learning.

From participants' stories, which are considered to be the essence of the study, readers will get a deeper understanding of Chinese culture, tradition, moral standards, and the importance of kinship. The biggest significance is that it reveals the difference in the perspective of older adults' values between the western world and Chinese culture. The study also shows the increasing awareness of older adults of the need to require learning opportunities. It also demonstrates that older adults, though at the late stage of their life, can still bring benefits to themselves as well as their families and society. They become more confident of their ability to make contributions to society and become active citizens. They also have the urge to be understood and to demonstrate their talents and value.

1.5 Limitation

China has more than 200 million older adults, but welfare policies, education opportunities, and purposes of learning are significantly different and unequal in major cities and some remote rural areas. Merriam and Caffarella (1999) and Valentine (1997) claimed that in the western world older adults who participate in learning activities are mostly middle class white people. The level of education they received earlier in life is also an indicator for participation in learning activities later in life (Manheimer, Snodgrass & Moskow-Mckenzie, 1995). Research on lifelong learning in mainland China is still not comprehensive. Although this study tries to present typical lifelong learning experiences of Chinese older adults, it still has its limitations.

First of all, all participants were born and raised in Beijing, the capital city, which is considered the best developed and the richest city in China. Comparatively speaking, all participants have good educational backgrounds and had decent jobs before retirement. They are all economically secure after retirement. Therefore, the subjects in this study do not justifiably represent the real life situation of older adults in Beijing who are not economically secure and those who live in other cities in China.

Second, this study is context specific, since all participants attended the same well-known university located in the Hai Dian District in Beijing, whose education quality is considered the best in Beijing; the university is well sponsored by the government and Beijing municipal community. Therefore, students' views on the quality of, classroom facilities and programs could not represent opinions of students from other universities.

Third, the study cannot represent the role of lifelong learning in older adults who have mobility difficulties. In most cases, older adults who have mobility difficulties will learn at home, through online courses. Their experiences, expectations and perspective on improvement of program provisions are still unknown to us.

Last, the fundamental drawback of qualitative research is that interpretation depends largely on the researcher's cognitive recognition of certain social events, cultural background, the knowledge the researcher have obtained on subjects discussed in the study, and the relationship between the researcher and the participants (Cresswell, 2012). Although the author would try hard to avoid allowing personal emotions to affect the study, it is not guaranteed that her personal bias does not influence interpretation (Willig, 2013) of the participants' experiences, which is to say that data interpretation inevitably has subjective content.

1.6 Organization of the Thesis

The rest of this thesis is organized as follows. Chapter 2 introduces literature on aging, lifelong learning, older adult learning and Chinese Confucian learning. Chapter 3 describes the research design, including an introduction to the selection of research methodology, method and participants, as well as location of the research institution, data collection and analysis. Ethical issues will also be discussed in this chapter. Chapter 4 presents the research participants' stories of their life and lifelong learning experience. Chapter 5 describes Chinese retired older adults' perspective on successful aging and being active citizens. It also reveals how lifelong learning facilitates successful aging in general, as well as discussing provisions for older adult learning in Beijing and the issues to be dealt with or improved. Chapter 6 presents a discussion about the similarities and differences in understanding successful aging between the existing literature, which focuses on western perspectives and the Chinese older adults' perspective about successful aging. At the end there is a summary of the role of lifelong learning in facilitating successful aging in China, suggestions for further research on Chinese older adults' learning, and further explanation as to the limitations of this research.

Chapter Two: Literature Review

In this chapter, through reference to the literature, I will present a clear picture of aging and its impact. Then I will consider an in-depth analysis of the concept of lifelong learning, including an analysis of its four pillars and how lifelong learning facilitates successful aging and active citizenship. After that, I focus on literature that discusses older adults' learning and learning theory. Finally, a picture of Chinese older adults' learning culture, traditions and real life learning situations is presented in this chapter.

2.1 Research on Aging and Related Issues

2.1.1 *Successful aging*

The world is entering an era of the aged. The wellness of older adults has become the focus of governments and has drawn public attention. The wellness of older adults is associated with successful aging, which has been widely promoted across the world. Successful aging is usually defined by the physical health, financial security, coping ability and staying active with social involvement. Gerontology literature defines successful aging as “obtaining life satisfaction, longevity, and freedom from disability, mastery and growth, active engagement with life, and independence” (Moody, 2005, p. 59). Rowe and Kahn (1987, 1997) suggested that three main components for successful aging are: “Avoiding disease and disease-related disabilities by adopting a healthy lifestyle, maintaining high mental and physical functional capacity and actively engaging with life” (DeVaney, 2008; Ouwehand et al., 2007). Older adults are encouraged to live with the “spirit of geriatric care model” which adds years to life (Sternberg & Gordon, 1998, p. 9) and makes life more meaningful and successful. In the following paragraphs I will explore some factors that promote successful aging.

2.1.2 *Aging and health*

What is aging? Technically the most straightforward definition is by referring to the chronological factor, i.e.. how old a person is in years (U.N. Das, 2011). Usually chronological divisions are made within older adults, such as the young old (65-74), the middle old (75-84), and the oldest old (85+) (Zizza et al., 2009). No matter which division older adults belong to, physical senescence, which is characterized by grey hair, wrinkles, hunched back and shaking legs, is an inevitable process of aging. With it comes organism senescence, which is invisible to the eye and is characterized by “declining ability to respond to stress, increasing homeostatic imbalance and increased risk of disease” (U. N. Das, 2011, p. 492). Chronic diseases are the major cause of death among older adults, including heart disease, stroke, cancer and diabetes, which are the most prevalent (House of Commons Canada, 2012). In addition, arthritis, depression and delirium are also common chronic diseases for older adults. In the U. S, three out of four people aged 65 and over have more than one chronic health problem (Anderson, 2011). In Canada, 74% to 90% of seniors suffer from more than one chronic disease. Since the number of older adults is increasing dramatically (Ice, 2005), health concerns for people aged over 65 are becoming a global issue.

The reasons of worldwide concern over older adults’ health conditions include: 1) governments need to bear huge economic cost for medical care; 2) the cost of medication adds to the finance insecurity of older adults, especially for those who are retired; 3) illness prevents older adults from healthy aging, which makes retired life more difficult. In the report by the Standing Committee on Health from the House of Commons Canada (2012), a total of \$190 billion has been spent on treatment of chronic diseases and related lost productivity. WHO’s report on investment in chronic disease (2005) pointed out that expenditures on direct medical care and associated issues is a huge percentage of national income; the estimated loss in national

income from chronic diseases in 2005 is approximately 18 billion dollars in China, 9 billion dollars in India, 1.6 billion in the UK and 0.5 billion in Canada (p. 78). Since the size of the aging population keeps increasing, the estimated cost in 2015 will be three to six times of that in 2005.

Chronic diseases or illness are also closely related to the finance insecurity of older adults. WHO (2005) pointed out that the recent economic crisis was most likely to have a great impact on the lives of older adults. Older adults have greater risk of losing their jobs and are less likely to be re-employed than younger people, so they are more likely to live in poverty. DeVaney demonstrated in her research (2008) that the “median household income of a person aged 65 and older in 2005 was \$26,036, which accounts for one third of all households in the lowest quintile” (p. 211), and the household income of a person under 65 is twice as large. In this case, the high cost of medication will only add to older adults’ financial burdens and bring more insecurity to their retired life.

Chronic diseases and illnesses can only challenge the wellness of older adults. Physical disabilities create mobility difficulties for older adults. They are restrained at home most of the time and without other people’s help it is not possible for them to go out and have an active social life. When they can’t interact with the outside world, they become more uncommunicative; their stillness may bring other physical discomforts. As a result, these older adults are likely to be depressed because of their disability, isolation, and psychological stress (Vieira et al., 2014). Depression is considered a big threat to older adults, as it can lead to suicide, which WHO has identified as the fourth leading cause of death (Vieira et al., 2014). In view of the above circumstances, older adults’ health is a priority in achieving a happy quality of retired life.

2.1.3 *Aging and financial security*

As already pointed out in the above topic, poor physical health can create a burden on older adults' financial condition. To obtain financial security is the basic and first priority in older adults' lives, especially for those who retired. Surviving, which lies at the bottom of Maslow's (1943) hierarchy of needs, is the basic need of human beings. To obtain financial security means to fulfill the survival needs of human beings and to ensure a standard of living that goes beyond physical necessity by supporting higher levels of human needs required to participate in community social activities, which in turn signifies social inclusion (Huxley & Graham, 2003). Financial vulnerability results in loss of dignity and social exclusion (Saraceno, 2001). Retired older adults can enjoy their retirement only if they are financially secure, so effective pension plans and retirement benefit programs are welcomed to ensure economic security for retired older adults.

2.1.4 *Aging and physical activities*

In order to maintain sound physical health, older adults need a certain amount of physical exercise. Martinson and his colleagues (2003) assert that "it is possible increasing levels of activity could reduce medical expenditures in this group within a year or so of the onset of behavior change" (p. 1095). Their research showed that regular physical exercise can "reduce the risk of chronic disease, premature mortality, functional limitations, and disability" (p. 1098), and bring benefits to older adults which include "management of depression and anxiety," "prevents or delays cognitive impairment, and disability, and improves sleep" (p. 1099). Regarding the above benefits, older adults are encouraged to do more physical exercise in their free time and more public facilities should be made accessible to older adults to perform physical exercises.

2.1.5 *Aging and learning*

As discussed earlier, successful aging means being healthy, happy, obtaining physical and cognitive function, and experiencing life-satisfaction (Menec, 2003). Sloane-Seale and Kops (2008) revealed in their research that participation in educational activities can help older adults obtain an active lifestyle, connect more closely to society, have a sense of self-connectivity (to know oneself better and as a result be more confident of oneself), be more flexible and adaptable, and finally, be able to make sense of life itself. It promotes an individual's "intellectual, physical, emotional and social well-beings" (Sloane- Seale & Kops, 2008, p. 38). Gerontology theories proposed that "participation in social activity can help people maintain or develop new interpersonal relationships and produce a range of psychological benefits in later life" (Li et al., 2013, p. 998). Social activities have taken an irreplaceable role in older adults' lives.

Learning can help older adults achieve higher levels in Maslow's hierarchy of needs. It definitely provides an opportunity to connect with society, guarantees communication with others, and ensures that older adults keep up with and are involved in the rapid development of society, so that they are not excluded. However, there is some doubt as to whether older adults are still able to learn. The lifespan development theory (Baltes & Baltes, 1990) claimed that people have the capacity to learn, adapt, develop, make choices and remain in control of their lives into old age. Even at later stages of life, physical, mental and social growth and development are possible (U.N. Das, 2011). By learning, older adults are able to balance gains and losses and adapt to changes in life (Baltes & Baltes, 1990).

Learning plays an important role in facilitating successful aging. Lifelong learning embraces a wider and more sophisticated meaning. The goals of lifelong learning include learning to know, learning to do, learning to live together, and learning to be. Lifelong learning is

motivated and influenced by social changes; individuals learn and develop to exist and keep abreast with changes (Jarvis, 2009). Learning introduces changes as well. One of the main purposes of lifelong learning is democratic citizenship (Zepke, 2013). It reduces social bias against marginalized groups such as older adults. Learning provides retired older adults with a stage on which to show their talents, contributions and value to the public. In the following paragraphs, we will examine the concept of lifelong learning, its features, and its benefits for older adults.

2.2 Lifelong Learning

In modern society, knowledge is recognized as most valuable by the majority of people around the world. Politicians keep emphasizing the significance of creating a knowledgeable society and lifelong learning offers a remarkable opportunity to achieve that goal. The European Commission on Lifelong Learning defines lifelong learning as learning activities undertaken throughout life for the purpose of improving knowledge, skills and competence (European commission, 2000). However, the concept of lifelong learning is ambiguous (Aspin & Chapman, 2000) and it has a complex history. One can trace the development in two ways: an educational approach and a learning approach (Crowther & Thutterland, 2008).

At the beginning of the twentieth century, lifelong learning emerged from the idea of adult education for those who exceeded regular school age. However, continuing education is the most favourable term used to define lifelong learning, as it has no specific ending (Crowther & Thutterland, 2008). Taking into account the rapid development of the western world, the term lifelong learning has won the favour of politicians (Field, 2006). The well-known Delors Report has made lifelong learning a mainstream political term, but the priority was to guarantee the competitiveness and economic growth (Delors, 1996) which made lifelong learning more economy- and power-oriented.

In the study of learning many theories have emerged, including child learning, adult learning and older adult learning. There are comparisons between learning styles among people of different ages. The learning approach shows a more humanistic side in lifelong learning.

Jarvis (2006) also tried to define the approach from the perspective of learning

the combination of processes throughout a lifetime whereby the whole person—body (genetic, physical and biological) and mind (knowledge, skills, attitudes, values, emotions, beliefs and senses)—experiences social situations, the perceived content of which is then transformed cognitively, emotively or practically (or through any combination) and integrated into the individual person's biography resulting in a continually changing (or more experienced) person. (p. 134)

Then it extends to the discussion of learning with different cultural backgrounds, learning communities, and learning to be democratic citizens. The democratic lifelong learning research concludes:

Adult education must not be regarded as luxury for a few exceptional persons, nor as a thing which concerns only a short span of adulthood, but it is a permanent national necessity, an inseparable aspect of citizenship and therefore should be both universal and lifelong. (Adult Education Committee of the Ministry of Reconstruction, 1919, p. 5)

Lifelong learning has become a new educational reality which involves the whole life span (Fields, 2006). Today education and training opportunities are more available to citizens both at a young age and at middle age. However, the significance of lifelong learning in facilitating successful aging is still not well known and needs further investigation.

2.2.1 *Four pillars of lifelong learning*

In order to have a clear idea of how lifelong learning facilitates successful aging, first we need to understand the concept of lifelong learning and its focus. The concept of lifelong learning is constructed on its four pillars: *learning to know, learning to do, learning to live together and learning to be.*

The first pillar is *learning to know*, which is defined as a matter of mastering instrumental knowledge. It enables individuals to understand the environment he/she lives in, to develop occupational skills and communicate (Delors, 1996). The process can offer an individual “a pleasure of understanding, knowing and discovering” (Delors, 1996, p. 87). Learning to know requires concentration, memory and thought (Delors, 1996, p. 87). It is considered the initial foundation of a well-trained mind which is prepared for further learning throughout life.

The second pillar is *learning to do*. In the first place, learning to do is more vocational training-oriented, in that it aims to transform knowledge learned into practice. Later, due to the requirement of economic development, more emphasis has been put on how to “transform knowledge into innovation and new business” (Delors, 1996, p. 89). In order to be competent workers in industry, good communication, team-work and management skills are required. So the emphasis on learning to do has gradually shifted to soft skills and the service sector. However, while facing an unstable and informal economy, the focus of learning to do is to be able to “cope with uncertainties while playing a part in creating the future” (Delors, 1996, p. 91).

The third pillar is *learning to live together*. It is human nature that some people tend to “value their own qualities over others and harbour prejudice on others” (Delors, 1996, p. 92). Education can assist people to understand and be aware of individual differences. But in order to achieve understanding, people need to know themselves first with an accurate world view. After they have discovered who they are, they can then “put themselves in others’ shoes,” and develop empathy for others (Delors, 1996, p. 93). Searching for shared purposes and interests at work or in other activities can help resolve conflicts, which can be achieved by being involved in activities such as helping the underprivileged and inter-generational assistance (Delors, 1996, p. 94).

The last pillar of lifelong learning is *learning to be*. It is the central theme of the Delors' Report. In the modern world, people are easily being manipulated by technology and mass media. The main task of education is to teach people how to learn to make judgements and behave responsibly, to be aware that they are free to make their own choices so that they can still develop their talents as well as maintain control of their lives (Delors, 1996). This stage involves developing persona criteria, including personality, independence and creativity and constructing social interactions. In the process personal identity is constructed by reflecting on ego, persona, and other factors (Merriam, 2001). This process also fulfills the desire to know the meaning of one's existence.

In the meanwhile, McClusky (1974) has conceptualized five learning needs of older adults: coping needs, expressive needs, contributive needs, influence needs and transcendence needs. First of all, older adults need guidance as to how to face life transitions, which refers to how they face and conquer the challenges of retired life. Then they need to express themselves, communicate with others and get feedback, so that they can have a feeling of belonging. Thirdly, older adults like to feel they are helpful to others and useful to society. Fourth, they need to feel their influence on building society's culture and morality. Finally, older adults want to go through an important transition in their life and become a better person and create achievements. By examining learning needs of older adults, we notice that older adults' learning needs are correspondent with the four pillars of lifelong learning.

Aldridge & Dutton (2009) claimed that learning to know implies becoming inspired and developing a passion for learning. We acquire knowledge in order to understand ourselves, our immediate world and the world beyond. As people get older, from time to time they reflect on their life experience and try to explore who they are. This is especially true for retired older

adults. Older adults learn new skills and get practical abilities through learning programs, which helps improve their competence so that they don't feel useless (Aldridge & Dutton, 2009). As a consequence, they regain self-confidence, which is considered to be the most important motivation to participate in learning activities (McNair, 2012). They realize that there are plenty of opportunities open to them (Aldridge & Dutton, 2009). In the meanwhile, "they will have lower levels of depression, faster recovery rates from illness and increased independence" (NIACE, 2010, p. 3), which perfectly responds to the coping needs of older adults. Older adults also find their expressive need met in learning, as they share stories and reflect together on the past, something they find young people are not interested in talking about. A research conducted by NIACE (2011) shows that for older adults, the activities they attend don't just need to be about learning; it is also about sharing information and learning from each other, to refocus on we (older adults) can learn from people, and they can also learn from us (NIACE, 2011), a process which gives them a sense of contribution and worthiness. Learning also helps older adults develop tolerance and mutual understanding and learn to be interdependent and to share experiences of learning with family and friends (Aldridge & Dutton, 2009), so that they can live a better life together.

In view of the correspondence between older adults' needs and lifelong learning, it appears that lifelong learning could be a strong link between older adults and successful aging. Lifelong learning allows older adults to exercise their freedom in choosing what they want to achieve, to become active and involved in social activities, and to contribute to creating a knowledgeable and democratic society. Additionally, individuals have freedom to choose what to learn based on their interests or the moral good of society, because "Society needs people who keep on learning and act independently but doing so for the good of the whole group" (Jarvis,

2008, p. 73). Because every individual is involved in shaping the future, the Delors Report claimed that (1996) everyone should learn to take personal initiatives. Regardless of their age, people can become expert in a specific field. Society should not underestimate the capabilities of older adults. Charness (2000) argued that an experienced and knowledgeable older adult will outperform a young adult who is swift, with good computer skills, but less knowledgeable.

Lifelong learning is perceived as a private good. As a marginalized group, older adults should learn to exercise choice, take responsibility and be self-directed (Knowles, 1980). Through their actions they can demonstrate to the public their wisdom and worthiness. Aristotle regarded wisdom as something that comes with age. Elders are the ones who possess the real wisdom and their wisdom should be appreciated (Jarvis, 2008), as long as there are stages provided for them to display their wisdom and talents.

Learning helps people reappraise their cultural and personal assumptions and develop a consciousness of them (Findsen & Formosa, 2011). It also brings confidence and happiness to older adults, as well as developing active and democratic citizenship. In this case, older adults should be encouraged to participate in lifelong learning for both individual wellness as well as the wellness of the whole society.

2.2.2 Critiques of lifelong learning

Lifelong learning has become a new educational reality which involves the whole life span (Fields, 2006). Lifelong learning is supposed to be provided for “the many, not for the few” (Field, 2004). However, researchers (Merriam & Caffarella, 1999; Valentine, 1997) showed that participants in lifelong learning are “white, middle-class, well-educated” and, most importantly, they are financially secure. There is doubt whether lifelong learning contributes to equality or inequality. The provision of lifelong learning has also received criticism for being economy-oriented. It has become a tool of getting more economic benefit for power groups, which makes

lifelong learning occupation-oriented instead of promoting morality and democracy. Educational institutions are sponsored by enterprises who decide what knowledge and skills are taught according to needs of business development. Learners lose their freedom; they have to learn in order to keep their jobs. Under such circumstances, lifelong learning has been given the notorious name of “lifelong earning” (Field, 2004; Soni, 2012). As such, older adults are sure to be excluded from main stream learning in lifelong learning.

Altogether, lifelong learning could help facilitate successful aging according to our analysis of the literature. Older adults should be encouraged to participate. Through lifelong learning people learn to live with each other, instead of judging each other (Medel-Añonuevo, Ohsako & Mauch, 2001). As a result, older adults will not be considered a marginalized group and a more democratic society will develop.

2.3 Older Adults and Their Learning

The world have stepped into the “age of aging” (Findsen & Formosa, 2011), and it has to prepare for the challenges of an aging society. Governments need to ensure the well-being of older adults. A friendly environment is called for by older adults, in order to have an easier transition to their new social roles. Family members of older adults need to be trained on how to take care of their elder family members. In order to serve and help older adults, people need to understand them. In the previous chapter it was pointed out that learning can help older adults with life crisis. This section will closely examine how older adults learn, what kind of learning activities they prefer, what the obstacles to participation are, and what the role of learning in their lives is.

2.3.1 *Older adults’ learning and senescent*

First of all, let us consider how physical aging affects learning. Consider Jarvis’ theory that the learning process involves the brain, the body and the mind. Learning involves all five

senses of human body. During the process of physical aging, the human senses get weaker and the cells in the brain are dying. It is generally recognized that older adults are supposed to be slower in reaction time, have difficulties in focusing attention and possess poor memories (Erber, 2005). However, according to Horn and Cattell (1967), although older adults are slower in terms of reaction time, they are better at using their life experience to solve problems. The main reason is crystal intelligence. Horn and Cattell categorized human intelligence into two types: fluid intelligence and crystal intelligence. The former is related to logical thinking, analyzing and solving problems under novel situations, which decreases with age. The latter involves abilities to use skills, knowledge and experience accumulated in life, which improves with age. The research shows that older adults have their own advantages living in society; they have specific skills that younger people do not, and there are still possibilities for older adults to develop themselves through learning.

2.3.2 Benefits of learning for older adults

As indicated in the study of Ball and colleagues (2002), age-related cognitive declination can be reversed or at least slowed down by more practice for the human mind. As long as the mind is active, there is much less opportunity for older adults to have chronic diseases such as Alzheimer's (NIACE, 2011). The study shows us that older adults are not only able to learn, they also become healthier by attending learning activities (Stanistreet et al., 2013). Older adults who attend learning activities have a smaller chance of developing mental illness and recreational activities can strengthen physical health. Moreover, learning provides older adults with opportunities to understand basic health-related information as well as "the knowledge, skills, beliefs and confidence to manage one's own health" (Aldridge & Dutton, 2009, p. 5). According to a background paper (2006) from the Canadian government, active elder life can result in significant savings in the cost of health care, social care, pensions and benefits.

Learning can also help older adults avoid experiencing feelings of vulnerability, loneliness and dependence. Reaching the age of retirement can make things worse. There is a feeling of sudden loss of self-identity. The reality of retirement makes older adults doubt their personal value; a future based on returning to an eternal domestic role becomes difficult to accept. The situation is worse for male adults. According to society's value system, they are not trained to be a full-time husband, which makes it more difficult to adapt and even harder to reconstruct their identities. When adults enter their fourth age, which is defined by Laslett (1989) as one of final dependency, decrepitude and death, they become extremely vulnerable and they are in urgent need of care and guidance. Clifton (2009) noted that for older adults in modern complex societies, the socio-cultural context has changed over time and those now in later life need to have the skills to manage more complex lives. Research demonstrates that learning can help older adults adjust to changes in their role and life pattern as they age (Fischer, Norberg & Lundman, 2008).

2.3.3 *Older adult learning theories*

“Learning as a process (rather than an end product) focuses on what happens when the learning takes place. Explanations of what happens are called learning theories” (Merriam et al., 2008, p. 277). In order to understand older adults' learning experiences better, we first need to understand how and why older adults learn.

At a later stage in life, older adults will unavoidably face challenges such as retirement, loss of a spouse, and death. These crises usually make older adults question the meaning of their existence, which later brings transformation (Mezirow, 1997). In order to cope with these challenges, older adults learn to negotiate with their feelings, values and meanings so that they can construct a new meaning of their existence (Taylor, 2008). The transformative learning is “a process of individuation, a lifelong journey of coming to understand oneself through reflecting

on the ego, persona and so on that make up an individual's identity" (Tylor, 2008, p. 7). During these transformative experiences, older adults can recognize differences and adjust their mindset and actions to negotiate their way into older adulthood, to keep up with the progress of society and "find belongingness and equity as a culture member" (Tylor, 2008, p. 7). The core of transformative learning is fostering changes in life, which is most needed when entering older adulthood, especially for those who retired.

The transformative learning experience can be constructed by engaging learners in narrative reasoning, which corresponds with older adults' expressive need. Sharing experience by telling life stories helps to construct transformative knowledge. In recent years, narratives and stories have drawn increasing attention in adult education (Rossiter, 2002) and they have a significant place in adult learning theory. Narration means to tell. Human beings communicate by exchanging information which contains large amounts of knowledge. Stories are based on personal experience. Narrations and stories are preferred by older adult educators because they are believable, easy to remember and entertaining (Neuhauser, 1993). Moreover, the specific situations and vivid images stimulate empathy and provide affective responses to others who have similar experiences (Marsha, 2002). Clark (2001) noted that if an adult identifies someone who embraced a similar experience has found it possible to change through the experience, then the adult him/herself will also envision the possibility of change for him/herself. Stories of achievement and transformation can motivate older adult learners to succeed in adjusting to a new life situation and achieving a new identity.

Transformative learning requires past experience and a perspective on life, which are increased and enhanced with age. Interpretation of past experience and frequent self-reflection on assumptions, emotions and perspectives can develop a new way of seeing the world

(Mezirow, 1991). Transformative learning “promotes inclusion, empowerment and learning to negotiate effectively between and across cultures” (Tylor, 2008, p. 9). It is also the goal and purpose of lifelong learning. The two correspond harmoniously.

Siedle (2011) noted that mature-age learning is very different from learning at universities and other tertiary institutions which demonstrate a high level of control on what to learn and how to relate what students learn to their life experience. Adult learning is considered primarily self-directed learning (Lawton & La Porte, 2013, p. 314). The learning motives of older adults can include “personal interests, social contacts and a high level of self-efficacy and functioning” (Plessis et al., 2011, p. 165). In the meanwhile, “the word ‘learning’ can be used to embrace a wide range of activity, in public, private, voluntary and individual settings” (McNair, 2012, p. 5). However, adult education usually includes three types of learning: formal, non-formal and informal learning. Formal learning occurs in classrooms in formal education institutions. Usually participants receive a recognized credential, such as a degree or a certificate. Students may have less choice as to what they will learn, as the courses are usually designed and guided by employment requirements. As defined in EU documents, formal learning is structured (in terms of learning objectives, learning time or learning support) and leads to certification. Formal learning is intentional from the learner’s perspective (Cedefop, 2001). It is believed that formal learning also contributes to the quality of life for older adults (Jamieson, 2007).

On the other hand, non-formal learning and informal learning are also important in adult learning. Non-formal learning is structured, but the difference is that it is not provided by educational or training institutions. The typical feature of non-formal learning is that it does not lead to certification. Informal learning is “effective because it is personal. The individual calls the shots. The learner is responsible” (Cross, 2007, XV). Informal learning is essential to lifelong

learning (Eaton, 2010), and it can “transform people’s life, it keeps people active both physically and mentally, it also provides opportunities for social interaction and personal development” (NIACE, 2010, p. 2). As one type of the informal learning, volunteer work has largely enhanced social inclusion. It also creates active citizens and builds strong communities (Guo, 2014; NIACE, 2010). Older adults are able to rebuild self-confidence and reconsider their value in society through volunteering, which helps discourage bias.

Considering all the benefits of learning, it is of prime importance for government, public organizations and institutions to provide learning opportunities to older adults. However, there are challenges related to non-participation, such as economic status, access to transportation, physical issues, and unawareness of learning resources. Merriam and Caffarella (1999) and Valentine (1997) argued that previous educational level is the single best predictor of participation in formal and informal educational activities for adults and they are more influenced by cognitive interest (Merriam & Kim, 2004). Most participants in older adult learning are well educated, middle-class, white and financially secure. Williamson (2000) found that women are more likely to participate in learning activities than men because most men were bread winners before they retire; work and family were their main interests. After retirement, they are not motivated to learn. In contrast, women usually leave employment at an earlier age for marriage or family reasons (Mid-winter, 1996). They are more willing to seek help and they have wider networks for friendship and are emotionally closer to others than men are (Arber & Ginn, 1995). Also, the marital status men and women in the third age influences their participation in learning. Older women without partners and who live alone are more likely to seek social companionship outside the home (Wilson, 1995). Some older adults are motivated to learn out of interest; some expect to be re-employed.

There are a variety of reasons for older adults' participation in learning. As a marginalized group, they need our attention. Through learning, older adults foster independence, tolerance and inclusion. It can help them find a smooth transition to older adulthood and successful aging. Older adult learning should also be investigated from the standpoint of different cultural backgrounds to examine how learning facilitates successful aging in specific social contexts.

2.4 Confucianist Tradition of Learning in China

Confucian philosophy has great influence in Asia, especially in East Asian countries. Confucius was born in 551 B.C. in China. At that time, education was hierarchical. Schools were available only for children of government officials (Zhang & Chan, 2003). Confucius was the first to advocate that there should not be any class distinction in education (Eno, 2012). He pioneered the idea that all people should have equal access to education, which coincides with one of the objectives of lifelong education (Zhang, 2008). Confucius had a strong belief that education could bring out talents and he believed that men are close to one another by nature; they only drift apart through behaviour that is constantly repeated (Analects, XVII, p. 94), and education can bring changes to a person. Thus it is not surprising that there were prisoners among his students. The core of Confucian Philosophy is to educate people in order to have both virtue and talent. It is similar to the modern idea of lifelong learning, which emphasizes being and becoming through learning (Jarvis, 2006). Confucian philosophy enhanced social inclusion.

Confucius was also the leading educator in older adult education. His students were of different ages, from 15 to over 60 years old (Zhang, 2008). As long as students had the intent to learn, they would be taught. There is no age discrimination in Confucian education philosophy.

The Analects advocated that

At fifteen, I had my mind bent on learning. At thirty, I stood firm.
At forty, I had no doubts. At fifty, I knew the decrees of Heaven.
At sixty, my ear was an obedient organ for the reception of truth.
At seventy, I could follow what my heart's desires without
transgressing what was right. (Analects, Wei Chang, Chapter 4)

Learning throughout one's lifetime is another core idea of Confucian philosophy. With increasing age, experience increases as well. According to transformative adult learning theory a person constantly reflects on life events and adjusts their opinions, identities and the way they see the world. Nevertheless, the Analects above also presented the development of a person. At the final stage of life, a person would be able to follow one's own heart and achieve self-actualization, which is also the goal of successful aging.

Also, Confucius' teaching was personalized. He demonstrated that teachers should teach in accordance with students' aptitudes (Eno, 2012). Teachers should know the character of each student in order to adopt different teaching methodologies. There are two ways to observe students: first, to involve a group of students in conversation and observe the students in group discussions. Listen to what the student says, determine how the student thinks and thus come to know the person. Secondly, observe the student when he is alone, watch his behaviours and listen to what he says. This methodology is widely accepted and still used in the field of education today.

There is one common misunderstanding about teaching and learning under Confucian philosophy. People in western countries generally believe that learning in Asian countries depends heavily on memorizing (Kennedy, 2002) and this is problematic, since there are doubts as to whether students exercise their own opinions when solving problems. However, if we take a closer look at the traditional Confucian learning style, memorizing is only the first step. "The Master says that a man is worthy of being a teacher who gets to know what is new by keeping fresh in his mind what he is already familiar with" (Analects, Wei Chang, Chapter 11). This

means that learning is a chain reaction: old knowledge can be connected to bring out new knowledge, so having a solid memory of the knowledge learned is basic in order to absorb new knowledge. This process coincides with the process of transformative learning, involving constant reflection on past experience (what is learned before) to arrive at new understanding and learning experience; thus knowledge is accumulated and updated. Therefore a solid memory of the knowledge learned is necessary and basic to the learning process. In addition, for Confucius it is not enough to learn only by memorizing: “Learning without thought is labor lost; thought without learning is perilous” (Analects, Wei Chang, Chapter 15). Learning and thinking should be combined in order to discover deeper meaning in the knowledge, after which the knowledge can be used in real life, which is the ultimate goal of learning. Confucius strongly encouraged students to use the knowledge learned in real life. Some of his students had become government officials, helping emperors rule the country. Their knowledge helped improve growth of the economy, security, and harmony in society. The essence of putting knowledge into practice is discussed in Zi Lu, one of Confucius’ disciples:

The Master said, though a man may be able to recite the three hundred odes, yet if, when entrusted with a governmental charge, he knows not how to act, or if, when sent to any quarter on a mission, he cannot give his replies unassisted, notwithstanding the extent of his learning, of what practical use is it? (Analects, Zi Lu, Chapter 5)

Other than his teaching methodology and concepts, Confucius was superior in his teaching content as well. The belief in a variety of teaching content involves cultivating one’s temperament, which is a basic requirement to be a ‘Jun Zi’ person who achieves outstanding virtue as well as vast knowledge. The wide-ranging learning content included the classical ‘six arts’: rites, music, archery, riding, writing and arithmetic. Students were expected to learn these six skills before 15 years of age (Xiong, 2011). Then the classics that Confucius taught included

the Book of Odes (Shi Jing), the Book of Documents (Shu Jing), the Book of Rites (Li Ji), and the Book of Changes (Yi Jing), the spring and autumn Annals (Chun Qiu). Learning is combined with basic theories and the six arts. Students could start with learning skills and then later achieve morality (Peng, 2005). Overall, Confucius' philosophy of education is humanist and oriented towards the societal good (Xiong, 2011).

Confucian philosophy has had great influence on education in China. The philosophy is also applicable and in parallel with western adult learning theory. For Confucius, the prime purpose of learning is to be fully human and to become a qualified member of the community of trust, which can be achieved by enhancing self-cultivation and developing one's inner strength of assuming responsibility for oneself, for one's family, and for society at large (Yao, 1999). We can interpret it as advocating active citizenship. In China, many learning programs in the older adult universities have stuck to Confucian philosophy in teaching and learning. In the context of Chinese culture, it might be best to combine Confucian philosophy and western adult learning theory when teaching older adults in China.

2.5 Older Adult Learning in Contemporary China

Lifelong learning is nothing unusual in Chinese history. It can be traced back to Confucius, who advocated lifelong learning and was a lifelong learner himself. The oldest student of Confucius was only four years younger than himself. The primary goal and extrinsic motivation of Confucian education was to cultivate students to become scholar-officials (Hayhoe, 2008). In order to become scholar-officials, students had to succeed in the Imperial Examination, which was held once a year. The exam was open to all the males in the country, without age limits, and it was very challenging and resulted in huge competition. It is not rare that people who failed many times were still dedicated to the examination. The oldest candidate on record was 80 years old. However, in ancient China, women were not allowed to study in the

public schools and were not allowed to take the national exams. In other words, education in ancient China was not inclusive.

A cross-culture survey of older adult learning experiences conducted in 2001 showed that Chinese older adults prefer to study in classes (Leung et al., 2005). The study indicates adherence to deep cultural heritage from ancient times. Oxford and Anderson (1995) argued that Chinese learners prefer strictly supervised classrooms where inductive learning is taking place. This style of learning is considered the typical Chinese learning style, which is understandable when one understands Chinese history. China is a big country with a huge population. If people want to have education opportunities they must face competition. In modern times, in order to get a better job, everyone studies harder in order to get into a good university. In the workplace, people compete to get additional training opportunities in order to be promoted in the job. However, older adult learning in China embraces a different purpose. Although older adults are not familiar with the term successful aging, they try to discover their interests, live an enjoyable life, and actively seek happiness in their retired life.

The notion of 'live and learn' is rooted in the Chinese spirit. Throughout history, Chinese people, no matter how young or old, have followed the Confucian learning tradition and they are always seeking opportunities to learn. The Chinese people understand that learning lasts for a lifetime and it grows into a habit. However, the learning spirit has experienced huge damage from the shocking events of the Cultural Revolution of 1966 to 1976, which deprived a whole generation of education opportunities, and it has resulted in a negative impact on their learning experience and habits.

In 1966, Mao started the Cultural Revolution, which had a disastrous impact on the traditional Confucian learning concept. Primary schools and middle schools were closed for two

years from 1966 to 1968. Universities were completely closed for four to six years, as was adult education. As education is closely connected with the economy and manpower resources, China experienced a very low growth in its economy and a great loss in accumulated manpower (Cai & Du, 2003). People of school age could not get an education. The whole generation has a fairly low literacy standard, which was also considered a potential problem for social reconstruction. The Cultural Revolution also caused tremendous damage to the adult education system which have being introduced in 1949. The establishment of an adult education system had a significant meaning in China, as it provided education opportunities to workers and peasants and it broke the long lasting feudalism education framework of ancient times (Hu, 2008). Unfortunately, the new adult education system was put to a stop in the Cultural Revolution as well.

After the revolution ended in 1976, the Chinese government strived to make up for the economic loss. At that time, China was still under the planned economy and manpower system until the early 1980s. In 1978, the open door policy brought tremendous changes to the Chinese economy and Chinese society. Deng advocated a market economy and a new manpower plan. The reformation filled the market with vigour. Free trade in the open market created abundant employment opportunities. As a result, education was required to train manpower with different skills. After being shut down for years, adult education has experienced a spectacular expansion both in range and depth (Guo, 1996). Meanwhile, individuals' motivation to learn was greatly inspired. This period was considered the redevelopment period (Wang et al., 1988). However, adult education was still largely related to career and income. It was considered a tool to train manpower for the state and was simply a supplement to formal education (Cheng et al., 1999).

By the end of 1970s, after the Cultural Revolution, the idea of lifelong learning came to China (Cheng et al., 1999; Zhong, 1979), but it did not win much influence until the early 1990s

(Cheng, 1999; Huang & Shi, 2008). Lifelong learning has drawn significant attention from the Chinese government and was put into policies (Hao & Wang, 2009; Huang & Shi, 2008). At the National Education Conference of 1999, former president Jiang pointed out:

Lifelong learning is the trend of the world.... We should gradually set up and perfect the educational system that is helpful to lifelong learning. General education, vocational education, adult education and higher education should strengthen their articulation and integration, providing various education services for learners. (Jiang, 1999a)

In 2003 the first National Talents Conference was held, aimed at invigorating China through science and education. It has become the fundamental guideline for establishing a learning society in China (Huang & Shi, 2008). By 2007, there were 1.03 million adults enrolled in literacy classes (Department of Educational Development Planning under the Ministry of Education, 2007); 0.2 million enrolled in senior secondary adult schools (Statistical Bulletin of Educational Development in China, 1997-2006); 1.12 million in specialized secondary adult schools (Statistical Bulletin of Educational Development in China, 1997-2007). The institution of adult higher education enrolled 1.9 million students in 2007, which accounted for 21% of the national total enrolment in higher learning (Chinese National Commission for UNESCO & Chinese Adult Education Association, 2008), which indicates that adult education is still greatly needed in China.

With the economic growth, income has greatly increased and the market is booming. The Chinese people have enjoyed a better quality of life. Improvement in the material world is the foundation and it inspires pursuits in the spiritual world. The Chinese people pay more attention to their own interests. They want to know more about different cultures and new technologies. They aspire to more self-development, not only in job-related ways, but in a broader sense to improve their spirituality.

In 1987, the State Education Commission stipulated five aims for adult education. The significant of changes in policy is that it emphasizes continuing education for the educated and referred to enhancing adult lives and culture (Cheng et al., 1999). The policy demonstrates a shift from manpower considerations to the realm of lifelong learning in the genuine sense of the term (Cheng et al., 1999). In 2006, the Sixteenth Central Committee of the Communist Party of China (CCCPC) passed a strategic document regarding Building a Harmonious Socialist Society (CCCPC, 2006). The Chinese government realizes that the human being is the essence of society. In order to build a vigorous, harmonious society people's needs must be served, which needs include equal access to public facilities, health care, education and employment opportunities (Wang & Morgan, 2012).

However, the Chinese government still faces big challenges in the uneven distribution of social welfare among citizens who are immigrants and those located in remote areas compared to urban citizens. In order to solve this problem, the government needs to first of all provide education opportunities to these people. As Morgan argues that

Continuing education is a 'resource' for social capital development and active citizenship. It both 'stimulates' interest and provides knowledge and skills that 'enable' people to participate confidently and effectively. Continuing education, especially non-formal and informal, is also a 'product' of social capital and active citizenship. It builds confidence, trust, and further participation. Consequently, policy interventions which improve educational attainment and develop learning and skills can assist this 'benign cycle' of interactions. (Morgan, 2008, p. 39)

From this perspective, promoting lifelong education has become a major issue for the Chinese government. The practice includes: training for laid-off workers; training for rural migrants; and community education and on-the-job training (Huang & Shi, 2008; Wang & Morgan, 2012). The recent policies regarding enrolment for higher and vocational education are more open, with no age limitation and availability of more flexible education programs (Hao & Wang, 2009).

Unfortunately, the fact is that adult education opportunities are usually provided to people between the ages of 18 and 40, especially those who are currently employed. Groups such as the elderly are largely excluded (Guo, 1996).

Nevertheless, in view of the quick demographic change in the world, with a rapid growing number of older adults, the Chinese government realized that the wellbeing of older adults can have a large impact on the national economy, social morality, citizenship and social harmony. As advocated worldwide, lifelong learning is the key to facilitating successful aging. Through learning older adults can cope with life crises, get control of their own lives, be active citizens and contribute to the country. In the meanwhile, through learning older adults can find happiness in their lives. In view of all the benefits of lifelong learning, the Chinese government has been trying to encourage and implement learning opportunities for older adults. By 2005, there were 26,000 institutions set up for older adults in China; 2.3 million students had enrolled. The system for older adult education had been established with multiple forms, scales and disciplines (Hu, 2008). Lee's research showed that due to strong Confucian philosophy influence "Asian learners have a high regard for education and display a positive attitude towards education. They are achievement oriented and willing to spend a lot of their free time on study" (Lee, 1996, p. 25). After retirement most older adults in China plan to start enjoying their life; they finally have time to do what they want to do and develop their interests. However, the number of Chinese older adults is huge and learning opportunities provided by government or local communities are far from sufficient to meet the needs. What's more, most programs provided to older adults are recreational, rather than aiming at personal development and guiding older adults to discover the meaning of life and self. Most of the courses open to elders are entertaining; they are not really related to the elder's life. Courses that teach how to maintain

health, and how to adjust to life transitions after retirement are more practical in helping older adults. Universities for the elders now can only be called elder activity centres.

Although lifelong learning is very popular among older Chinese adults, there are some limitations and concerns (Zhang, 2008). There are still 13,000 more universities needed to cater to another 1.14 million older adults. According to the above research result, there exists a great lack of opportunities to satisfy all older adults' learning needs within the formal education institutions. There is a lack of resources for elder education and there are concerns related to the quality of teachers in older adult education. On other hand, there are not enough teachers for the quickly growing number of older adults. Since most teachers of elders work part time, they cannot fully devote themselves to older adult education. Also, the participants in older adult learning are mostly retired employees from enterprises (35.4%), education (17.4%) and government (22.3%). There is not yet learning for all, but only for minorities.

Overall, from all the above literature we conclude that in the modern world the first priority in dealing with an aging population is to understand aging and the issues that come along with it. Older adults' lives become different from when they were young and the difference becomes more obvious after retirement. Suddenly older adults' lives are not in harmony anymore. Jarvis (2007) explained that when social change confronts people, they are forced to learn to adjust their behaviours to adapt to the new social conditions. That is why learning is required throughout a person's life. Because we live in a fast-changing world, people need to reflect on and adjust their behaviours in order to keep up with society.

Since human learning involves body, brain and mind, learning can bring changes to one's body, brain and mind in the areas of better health, cognitive recognition, skills, knowledge, attitude, values and beliefs (Jarvis, 2006). In certain life stages, people cope with all kinds of

disjuncture in life; they have to learn and adjust and thus become continuously changing people, and change happens through conscious or unconscious learning. That is why learning is part of living and why it is lifelong.

The aims of lifelong learning are identified in its four pillars. Lifelong learning means encouraging individual development by increasing new knowledge, skills and self-recognition as well as creating a democratic society and active citizenship. Through learning, everybody, no matter at what age, can make contributions to society for the common good in both economic and moral ways.

Though the concept of lifelong learning originates in the western world, a similar theory exists in the eastern world, too. In China, Confucius emphasized the importance of learning over a person's whole life span, and he also explained that at different ages people's learning needs vary and learning can make a person become intellectually and virtually better, which eventually contributes to a harmonious and democratic society. For Confucius, the purposes of teaching and learning coincide in lifelong learning theories. However, we assume that due to the specific cultural and social background, lifelong learning in China must have its own typical features, as does the perception of successful aging. In the following chapter, a qualitative research is designed to explore the similarities and differences in successful aging and lifelong learning between western and Chinese cultures

Chapter Three: **Methodology**

This chapter explains procedures employed in conducting the research study. I chose to conduct a qualitative study using life stories as research method. A brief introduction as to why I chose qualitative study with life history research and the advantages of using life history are presented. I will also discuss the details of research design, including data collection, data analysis, related ethical issues and the reliability of the research.

3.1 Why Qualitative Study?

I chose to conduct a qualitative research because the aim of the study is to understand the learning experiences of retired Chinese older adults and how they create meaning of their lives. I believe a qualitative study is the best choice because qualitative research provides multiple methods for researchers to collect data and the themes are built by adopting deductive thinking. In this case, the study was able to reveal multiple perspectives of participants' lives. Finally, qualitative research, aiming to reveal the unsaid, is able to empower individuals and make their voices heard (Creswell, 2012).

Retired older adults are considered marginalized and biased in every society (Findsen, 2008; Jarvis, 2008). They are the participants in my research. Facing a turning point in their lives, retired older adults need to cope with a complete social role change, which is mentally demanding. Older adults can experience great hardships. The purpose of the study is consistent with the aim of qualitative research, which is to unveil older adults' experiences and hardships, to better understand their behaviour, to seek to grasp the processes of how they create meaning and to describe those meanings to readers (Bogdan & Biklen, 2007). In this case, older adults' voices can be heard and proper and sufficient help can be provided. Based on the above reasoning, conducting a qualitative research is the best choice for my study.

3.2 Social Constructivist Worldview

“Qualitative research begins with assumptions, a worldview, a possible use of a theoretical lens” (Cresswell, 2007, p. 37). In qualitative research, there are several world views, including post positivism, social constructivism, advocacy/participatory and pragmatism. In this research, a social constructivist world view is adopted. Social constructivism is based on assumptions about reality, knowledge and learning (Jackson et al., 2006). For the social constructivists, both reality and knowledge are products of human activities. Learning cannot happen without the individual’s interaction with the world around him/her. The emphasis is largely put on the social context and cultural background of individual, which social constructivists believe can have a major impact on an individual’s learning.

The study is based totally on a Chinese context. First of all, in order to better understand the learning experience of participants, traditional Chinese education and learning culture will be introduced. The Chinese retirement policies will be considered to provide readers with a general idea as to what welfare and supports are available to retired older adults in China. Finally, significant discussion will be provided on the moral issues regarding how older adults are treated both in families and in society. In this case, the traditional Chinese morality standard as to how to treat older adults and the dominating concept of filial piety need to be understood. This study is completely constructed under a Chinese social and cultural background, so a social constructivist world view is the most appropriate world view to take for this study.

3.3 Research Methodology

When a theoretical framework is adopted, qualitative researchers should decide on a qualitative approach to start the inquiry. A clarification should be made prior to introducing methodology and method: that the goal of research is “to know.” There are usually two ways to justify knowledge, ontology and epistemology. Ontology is a theory of the nature of reality

(Delanty & Strydom, 2003). It is about issues as to what exists; it also refers to claims that a particular paradigm makes about reality or truth (Hitchcock & Hughes, 1989). On the other hand, epistemology investigates the possibility, limits, origin, structure, methods and truthfulness of knowledge and how knowledge can be acquired, validated and applied (Delanty & Strydom, 2003). In this research, knowledge is to be justified in an epistemological way.

In order to know, qualitative researchers need to adopt a methodology to conduct the study. Choosing proper methodology and method is of great importance for conducting research, as they determine how to efficiently tackle the research problem. A methodology is “a theory and analysis of how research should proceed” (Harding, 1987, p. 2). It “provides justification for the methods of a research project” (Carter & Little, 2011, p. 1317). The following is a brief introduction to methodologies (approaches) for qualitative researches. The most commonly used approaches on the qualitative research are: narrative approach, phenomenological approach, grounded theory approach, ethnographic approach and case study (Creswell, 2007).

The narrative approach aims to understand a phenomenon or an experience rather than to formulate a logical or scientific explanation (Kramp, 2004). The phenomenological approach explores, describes and analyzes individual experiences (Marshall & Rossman, 2010). The ethnography approach is based on direct observation (Gobo, 2011), and culture is the central to ethnography, which emphasizes analysis of actions and interactions among a group of people (Marshall & Rossman, 2010). Ground theory aims to “discover or generate a theory.” Its participants all experience an abstract schema of process and the theory developed “might help explain practice and or provide a framework for further research” (Creswell, 2007, p. 63). Finally, the case study “involves study of an issue explored through one or more cases within a bounded system” (Creswell, 2007, p. 73).

After we have acquired a general understanding of each methodology, we move on to a detailed introduction of the methodology that this study adopted, which is life history using a narrative approach. The following paragraph will explain why the narrative approach and life history are adopted by illustrating their features and how appropriate it is to use them in this research.

3.3.1 *The narrative approach*

Qualitative researchers are interested in understanding and interpreting human actions and experiences. They are not looking at control but to understand the participants' experiences (Creswell, 2012). In order to study participants' experiences, researchers listen to their life stories. Story is narrative, which "is understood as a spoken or written text giving an account of an event/action or series of events/actions chronologically connected" (Czarniawska, 2004, p. 17). As long as a story is narrated by an individual, it must be taken as important and having some influence on the narrator's life, as well as obtaining a special meaning to a life transformation, because a story describes specific events which obtain special meaning to certain group of people. Polkinghorne (1988) has pointed out that stories fill our cultural and social environment. They are created for ourselves and for others about our own past actions, which help in making sense out of behaviours. Considering the benefits, using a narrative approach is appropriate in order to study Chinese lifelong learners' learning experiences, to discover from their life events what motivates them to pursue learning all through life, and to understand what meaning they have created in their own lives as well as in other's lives through their actions.

We also use narrative schemes to inform our decisions by constructing imaginative "what if" scenarios. Much can be learned from people's stories. Clandinin and Connelly (2000) believed that storying and re-storying one's life is a fundamental method of personal and social growth, bearing in mind that human beings are ongoing social projects who are constantly

remaking themselves (Dhunpath, 2010), and the process can only be revealed through personal stories. Chase (2008) defined characteristics of narrative inquiry as “an amalgam of interdisciplinary approaches, and both traditional and innovative methods—all revolving around an interest in biographical particulars as narrated by the one that lives them” (p. 58).

Narrative is both the method and phenomena of study in narrative approach (Pinnegar & Daynes, 2006). A narrative can be oral or written or something heard during fieldwork, an interview or a naturally occurring conversation. The pivotal term includes life history, personal narrative, autobiography and biographies. The narrative is best for capturing detailed stories or life experiences of a single life or the lives of a small number of individuals (Creswell, 2005). Narrative inquiry emerges from Dewey’s theory of experience, which regards experience as a notation of an inexpressible (Dewey, 1976). Researchers need to find out what is hidden behind what is said and try to reveal the deeper meaning of experiences. One narrative bring out more narratives which contain deeper meaning. The narrative of approach suits my research purpose of discovering the deeper meaning of older adult learning.

Narrative inquiry explores the stories of the experiences, both individual and social, which make up people’s lives (Clandinin & Connelly, 2000). By studying an individual’s experience, the researcher can also explore the social, cultural and institutional narratives which constitute, shape, express and enact the individual experience. Through the study, the researcher can enrich and transform the experience for themselves and others, as well as changing the content and quality of the experience (Clandinin, 2006).

Narrative inquiry is still new in the research field, but it has earned popularity. Pinnegar and Daynes (2006) explained distinctive advantages to narrative inquiry: the narrative approach is to make the voice heard and the unknown known. It provides the researcher opportunities to

listen to voices from minorities, the weak and the marginalized groups. The approach largely welcomes personal narratives which can show society the reality of what is happening in people's lives, the dilemmas they encounter and the help they need. Narrative can definitely present the particular phenomenon rather than fall into "positive mainstream" (p. 20). What is more, narrative inquirers provide authentic and resonant findings by recognizing the tentative and variable nature of knowledge. They accept and value the "tentativeness and alternative views to exist as part of the research account" (Pinnegar & Daynes, 2006, p. 25).

Due to the distinctive features of the narrative approach, I believe it is the best choice for my research. I decided to choose life history within the narrative approach to proceed with the study.

3.3.2 *The life history*

Life history is a type of narrative which is "composed of self-referential stories through which the author-narrator constructs the identity and points of view of a unique individual historically situated in culture, time and place" (Hatch & Wisniewski, 1995, p. 115). By this research method, the researcher is able to connect an individual's life events to social events. In my research, the Chinese retired older adults are the narrators of their life stories, their life experiences, their physical and mental challenges. How they gain confidence and new insight into their retired life was revealed, so that society can discard their one-sided view and their bias against retired older adults and understand and appreciate their experience and help make changes. Hatch and Wisniewski (1995) believed that "life history enables us to understand larger human and social phenomena through individual's life stories. In the end, individual changes result in social changes, knowledge gained through listening to their stories promotes social good" (p. 113).

There are some specific characteristics of the life history research which distinguish it from other research methods. First, it focuses on the individual. Sparkes demonstrated (Hatch & Wisniewski, 1995) that

The ability of life history to focus upon central moments, critical incidents, or fateful moments that revolve around indecision, confusion, contradictions and ironies, gives a greater sense of process to a life and gives a more ambiguous, complex and chaotic view of reality. It also presents more “rounded” and believable characters than the “flat,” seemingly irrational, and linear characters from other forms of qualitative inquiry. (p. 116)

Second, there is a personal nature of the research process. In the research process, researcher and participant need to work together, to discuss how to best describe the experience and the most acceptable and precise way to summarize the results. Third, it is the practical orientation. The life history method can help shed practical light on theoretical understandings. Through interpreting individual experiences, it can make the strange familiar and vice versa (Sikes et al., 1985). Also, life history describes changes that occur in the biological and social history of one’s lifespan, so it can provide insights into the process of change (Sparkes, 1994). The characteristics described above demonstrate that the life history research is an appropriate method to study learning experiences of retired older adults with a strong Chinese cultural background, who are facing a series of changes at a certain stage of their lives. We can see older adults in our lives every day, but we ignore what goes on in their lives. We see them through our own eyes, but life history provides us opportunities to recognize older adults through their own perceptions.

3.4 Interview

Carter and Little (2011) explained that methods are “the practical activities of a research which include sampling, data collection, data management, data analysis, and reporting” (p. 1318). They are a crucial part of research studies. As explained in Marshal and Rossman’s book

(2010), several methods that are frequently used in qualitative research include observation, in-depth interview and digital story-telling. In order to collect data for this research, I decided to conduct several interviews with the participants. Interviewing is described as “inextricably and unavoidably historically, politically and contextually bound. This roundedness refutes the whole tradition of the interview of gathering objective data to be used neutrally for scientific purposes” (Denzin & Lincoln, 2008, p. 115). There are several types of interviews in qualitative research. They vary from the “highly flexible (with both tasks and questions varying from participant to participant) to highly standardized (with carefully specified tasks and questioning patterns)” (Novak & Gowin, 2008, p. 120).

In highly standardized interviews, the researcher asks each participant the same set of questions. The researcher is not supposed to indicate any personal feelings or opinions about participant’s responses during the interview process. Using this type of interview it is difficult to uncover deeper meaning from a participant’s responses. Sometimes participants try to assume answers that will please researchers. Comparing to a structured interview, an unstructured interview provides both researcher and participant more breadth to express their experiences and feelings. The researcher and participant usually need to spend a long time together in order to build trust. Thus the researcher can try to establish rapport between him/herself and the participant, so that he/she can better understand the participant’s experience (Fontana & Frey, 2008).

However, as Converse and Schuman (1974) observed, “there is no single interview style that fits every occasion or all respondents” (p. 53). The qualitative researcher needs to choose the best type of interview according to the research purpose and target groups to fulfill the research target. The researcher should learn to manipulate different interview skills such as observation,

emphatic sensitivity, and intellectual judgment (Gorden, 1992). In this study, I will conduct unstructured life story interviews.

The life story interview helps the researcher understand a single life in detail and the various roles the individual plays in society (Cohler, 1993; Gergen & Gergen, 1993). It can help listener, teller and reader to understand the self, others, the mystery of life and the universe around us (Atkinson, 1995). The benefit for participants who tell stories is that they have a better understanding of themes in their lives, their connection with others and a new perspective on the meaning of their own lives (Birren & Cochran, 2001). The experience of researchers who conduct life story interviews can also be transformed, by just listening, understanding and accepting the story without personal judgment, as the life story offers a glimpse of hidden human qualities and characteristics (Atkinson, 2007).

3.5 Ethics Considerations

The research reveals personal stories and experiences of participants. As a researcher, I have considered the ethics issues in advance so as to protect participants' privacy and interests. First of all, I obtained approval from the Conjoint Faculties Research Ethics Board to conduct this research. To proceed, I discussed with the participants the research purpose in detail and the way I intended to develop my research through interviews. Participants also made suggestions as to their preference regarding the interviews, such as where, when and how long the interviews should be conducted, so that we could come to an agreement and make the interview process smooth and successful. I also made sure all participants volunteered to join the research and asked them to sign a consent form before beginning the interviews. Then research topics were sent to the participants before the interview, so that they would have a better idea of what they were to be asked. As a result, they were able to experience the interview process with comfort and confidence.

The researcher-participant relationship is based on mutual trust and respect. In order to develop a more intimate relationship with participants, researchers should remove any academic armour so as to be accepted by participants when relating their life moments and sentiments (Denzin, 1997). Participants were informed of their rights during interviews (Johnson, 2002). They understood that they could refuse to answer any questions that might impact their reputation or personal life. They could withdraw from the interview at any time if they did not want to continue. All interview transcripts can be provided upon request. Participants were informed of the final usage of the interview transcripts. All data obtained with consent of the participants was kept in secure storage (Seale, 2004). At request of each participant, real names would not be disclosed. It was agreed both by researcher and participants that all data collected was to be used for this research only.

3.6 Research Settings

Below, a detailed introduction will be provided as to how the research was carried out, including locating the research institution (to recruit participants), recruiting the participants, establishing rapport with the participants, interviewing, analyzing data, and summarizing the results.

3.6.1 *Participants.*

The choice of research participants depends on the focus of the research (Saunders, 2012). Since I wanted to explore the lifelong learning experiences of older adults and the contributions of lifelong learning to successful aging and active citizenship, I targeted my participants among retired older adults who were between the ages of 55 and 80 and who were participating in one or more learning programs. In order to be context specific, all participants chosen had studied in the same educational institution. I planned to choose both male and female participants who were in different professions before retirement and who came from a variety of

education backgrounds but were participants in lifelong learning. Thus I would be able to discover common themes from diversities and each participant would have something unique to offer.

The preferable number of participants is four. Some researchers will find four participants insufficient, because there is not sufficient quantity to verify the quality. However, the current trend in the narrative approach is that number of participants in qualitative research has gradually become less significant. Qualitative researchers now adopt more word interpretation rather than number data analysis. Pinnegar and Daynes (2006, cited in Creswell, 2012) mentioned in their research that numbers can from time to time confuse researchers. They doubt if numbers can accurately interpret a social phenomenon. They question how many samples should be collected in order to get a convincing result and whether the numbers are trustworthy.

Numbers appear to be weak and flattened in explaining and interpreting social phenomenon. However, using words to explain an experience deepens understanding and opens up opportunities for more insight into the meaning of the event or experience. What's more, in the narrative approach words can invite participants to further explain their experiences and feelings, whereas numbers gives participants less opportunity to articulate their own understandings (Creswell, 2012). Yueya Ding (2010) created a database in her research in order to determine the number of participants sufficient for life history research. Among 44 dissertations using life history, "the average number of participants in those researches ranges from one to six" (Ding, 2010, p. 42). She also noted "Life history studies prefer depth rather than width" (Ding, 2010, p. 41). Furthermore, a small sample is considered useful, as there will be

dense culture descriptions in my research (Marshall & Rossman, 2006). Considering the above factors, experiences of four participants are sufficient to fulfill my research purpose.

3.6.2 *Locating the institution*

Lifelong learning is taken more and more seriously in China, especially among retired older adults. Learning has gradually become part of their lives. The most popular places for retired older adults to attend learning activities are the public universities for older adults and community learning centres, which are the perfect locations for recruiting my research participants. My research needed to be very context specific, as I am not aiming at generalization but to study the experience of retired older adults in one specific lifelong learning institution. The context of the research is very important, as it determines the role of participants and the nature of the study (Soloway & Walters, 1977). My friend gave me a magazine which targets older adult readers. In this magazine are enrolment advertisements placed by a few older adult universities. I decided to visit one of them.

The educational institution I chose is Beijing Open University of Older Adults in Hai Dian District. It is a member of the Beijing Longevity Club. The university was established in 1997 and is sponsored by the Beijing Municipal Government, with Ms. He Luli, who was Vice-chairman of the National Committee of the Chinese People's Political Consultative Conference as the honoured head of the university. The university aims at promoting lifelong education and increasing the quality of life for older adults in the community. It provides a variety of classes such as English studies, practical computer skills, dancing, singing and traditional Chinese painting. There are about 10,000 students enrolled in the university and their teachers are all professors in the related field. The university has achieved a good reputation due to its quality of teaching.

3.6.3 *Gaining access to the institution*

It is difficult for researchers to gain access to organizations, since often there might be a competition to gain access to a specific organization. At the same time, researchers are sometimes considered to have little to offer (Lee, 1993). Bearing in mind that the random visit to the university may end up in failure to gain access, I still wanted to take an “opportunity approach” (Buchanan et al., 1988, p. 53). Knowing nobody in the university, I decided to visit the enrolment office and was lucky enough to meet the person in charge.

Ms. Tang, who is in charge of the older adults classes, was very sympathetic and patient. I talked about my research with her, letting her know why I needed to interview older adults and what I planned to do with the interviews. I also explained how students’ participation is valuable both to me and to older adults themselves, so that public bias regarding older adults can be changed, as Marshall & Rossman (2006) explained that a better understanding of human experiences is acquired by research and actions are taken based on such understanding. In anticipating better service for older adult learners in China, their voices need to be heard first. I also let her know that I recognize the rights of the participants and guarantee that there will be no pressure and that participation is voluntary. She showed great interest while listening to me and seemed very supportive. Ms. Tang immediately recommended one of the most ‘popular’ students to me and called the student to arrange a meeting for the following day. I was very thankful for her assistance and chuckled to myself at my luck. I am sure my preparation regarding the details of my research and my sincerity won me the opportunity.

3.6.4 *Data collection*

After I obtained access to Beijing Open University of Older Adults, I started to recruit participants for my research. To meet the requirement of purposeful sampling (Marshall, 1996), I tried to find participants who had “specific experiences” (critical case sample) (Marshall, 1996,

p. 523). I also used snowball sampling (Browne, 2005). First of all, I had a brief meeting with the student Ms. Tang introduced to me. Her experience matched all the criteria for my targets, so I decided to allow her to participate in my research. Then she brought me to her class, where I made a small presentation about my research and asked students to contact me on my mobile phone if they were interested in participating. I also handed out a few copies of recruitment letters that I had printed beforehand. My original plan was to send recruiting emails, but considering that older adults who are 70 or 80 may not be very skillful at using computers and may not have an email account, printing the letter seemed a better solution. I also talked directly with a few students during the break and they all seemed interested and willing to participate. So very soon I had four participants.

Prior to the actual interviews with the participants, I decided to do a pilot interview, which is considered quite necessary for conducting a good quality interview. The pilot interview provides the researcher with opportunities to notice questions that are not well worded and improve the validity of the interview process (Seidman, 2006). I decided to interview my mom. My mom is retired but not participating in any class right now. She is 59 years old and she used to participate in learning activities after retirement. Unfortunately, since her health is not very good and she has mobility difficulties, she stopped all outside activities. It was most helpful to have her as a pilot interviewee because she had the experience of learning after retirement. Also, older adults who are 70 or 80 are likely to be fragile and cannot sit and talk for too long. My mom's feedback was valuable for redesigning some of my interview questions and time arrangements. After the pilot interview, I realized that the originally planned duration for one interview, which was 1.5 hours, might be too long for some older adults. They might not have sufficient energy to talk for 1.5 hours, so I decided to shorten the time to 1 hour maximum. Also,

some questions were too academic in nature and therefore hard to answer, so I revised the questions to make them as simple as possible. Olsen (2004) argued that pilot interviews are invaluable for developing theories and generating hypotheses; they are the base and starting point for a good qualitative research. After a pilot interview with my mom, I already saw some perspectives that I had not expected, as well as some hypotheses about participants' perspectives during the interview.

Then I proceeded to carry out my research interview with the participants. All interviews were conducted in Chinese. Three interview sessions were arranged with each participant, each session lasting one hour. I made sure one hour was the maximum for each interview session, considering the participants' age and physical condition. All participants preferred to have the interviews conducted at the University, as all of them come to class at least once every week and some come twice a week for different classes, so it was more convenient for them to participate in the interview after or before their classes. Thanks to Ms. Tang, we were always able to find an empty classroom for the interviews. Each interview was recorded by a digital audio recorder. After finishing three sessions of interviews with each participant, it was agreed that there would be no more face-to-face meetings. If participants needed clarification of any unclear points or to receive answers to questions, a telephone call would be arranged.

All interviews were conducted in Chinese because my participants could not speak English. After each interview session, I translated the recorded conversation word by word into English transcripts. In this case, I allowed myself time to talk about unclear points from the previous session in the new interview session to come.

3.6.5 *Data analysis*

After data collection, I started data analysis. Huberman and Miles (1994) claimed that data analysis is custom built, revised and choreographed. It aims to find out general statements

about relationships and underlying themes (Marshall & Rossman, 2006). I was confronted with a massive volume of information from recorded interviews with the participants. It is an overwhelming experience to make sense out of these data (Patton, 1980). Each transcript of an interview was read at least three times in order to get a sense of the interview as a whole before getting into details (Agar, 1980). An editing strategy (Crabtree & Miller, 1992) was adopted to analyze the existing transcripts with a focus on segments of texts to generate categories of meanings (Marshall & Rossman, 2006). After arriving at holistic understanding of each interview, I started introducing the participants and revealing themes in their stories using their own language. At the same time, I tried to generate common themes from the stories (Kramp, 2004). This approach is defined by Polkinghorne (1995) as an analysis of narrative; it helps draw common themes from individual stories (Kramp, 2004).

During the process, codes were developed. Creswell (2012) has given some advice on coding for qualitative research. He believes that codes can help develop themes and describe interesting and unusual information that the researcher both does and does not expect to find. I also pay careful attention to frequencies of certain words or phrases as they count for potential themes which will come up later (Stemler, 2001). Then I started to separate data, sorting out common themes and categorizing findings with different colours and prepared to present my findings “in an appropriate paradigmatic structure that allows me to move between the particular and the shared or common elements” (Kramp, 2004, p. 120).

3.7 Issues of Trustworthiness

One challenge for qualitative research is to validate the findings of the research. Creswell (2007) defined validation in qualitative research as “an attempt to access the accuracy of the findings, as best described by the researcher and the participants” (p. 207). Qualitative researchers always include personal interpretations of the events and other people’s experiences.

In order to make the research result more valid and reliable, I distanced myself from the participants from time to time so that I could face the findings with more objectivity. As a result, I was able to notice the change in my own view of the participants (Creswell, 2012). I tried my best to control the relationship between the participants and me in order to make the findings more reliable and subjective.

However, Angen (2000) argued that the findings should always be open to reinterpretation and validation is “a judgment of the trustworthiness or goodness of a piece of research” (p. 387). Whittemore, Chase and Mandle (2001) have identified several criteria for the validity of qualitative research which show that “the criteria standards have moved from the interpretive lens, with an emphasis on researcher reflexivity and on researcher challenges that include raising questions about the ideas developed during a research study” (Creswell, 2007, p. 206).

3.8 Reflexivity

During this research, I have experienced several moments of self-reflection in order to articulate my experience, judgement and interpretations of data collected. Self-reflection is a continuous process in qualitative research. As a researcher, one has to constantly exam his/her assumptions, the wording of interview questions, and interviewer-interviewee relationships. According to Morse and colleagues (2002), reflexivity adds to the trustworthiness of the research. It helps to clarify thinking, values, purposes, and beliefs. The researcher cannot be released from biases he/she possesses, but by reflection he/she can make the bias known (Watt, 2007).

During the whole process of research, I have made a lot of effort, giving thought to specific questions, as well as talking to friends about my research. I had been asked a question by a friend about what the difference in degrees of happiness are between older adults who attend

classes and those who do not. The question made me go back and examine my own bias about older adults who do not attend classes, and finally I came to the conclusion that happiness can derive from learning with others in community not necessarily in classroom setting.

Through reflection, I had a better awareness of myself and my bias within the context of participants' experiences as well as the scope of the research (Cole & Knowles, 2001). Thus the reliability and validity of this research will be left to the readers or other researchers in the same field to judge.

3.9 The Role of Researcher

The role of qualitative researcher is to be an observer in the real world in a certain social context, to interpret the events that happen involving individual's experiences, to try to make meaning and present the results to the world with the aim of helping people recognize an existing problem, and to empower individuals and make their voices heard (Creswell, 2007). Denzin and Lincoln (2005) argued that the qualitative researcher performs a series of practices that can transform the world; they "study things in their natural settings, attempting to make sense of, or interpret, phenomena in terms of meanings people bring to them" (p. 3).

I tried to present the real voices of retired older adults in my research findings, to be loyal to their original narratives instead of placing personal interpretation on it. At the same time, I became a learner myself. I discovered what retired life is like for older adults, why they behave the way they do. Meanwhile, I am also aware that as a life history researcher I need to understand myself first, tell my own story to others, as Chase (2005) explained that the reader can only understand research participants' stories after they have a good understanding of the researcher's life story.

I consider myself a lifelong learner based on to my life and study experience. My cultural and socio-economic background also enable me to have a better understanding of the

experiences of my research participants, as we have similar backgrounds. However, being a life history researcher, I need to be aware of what my situation is during the research to maintain the authenticity of the research instead of letting my bias interfere. So though I have established respect, trust, and care with my participants (Cole & Knowles, 2001), which allowed me to conduct in-depth exploration of their lives, I did not abuse the relationship in order to convey my perception. Instead, I maintained objectivity and rationality and only conveyed participants' individualities (Ding, 2010).

Having provided details of the research design, in the next chapter I will introduce to the readers my research participants and explore their life stories.

Chapter Four: Meeting the Participants

In this chapter, lifelong learning experiences of four participants are presented, unfolding of their life stories in chronological order. Starting a biographical writing which identifies the objective experiences in the subject's life (Denzin, 1989) is a good beginning and a common element in narrative analysis (Creswell, 2007). The key events in participants' lives are put together and emphasized (Denzin, 1989), with a writing style that is "highly-readable, friendly and applied for a broad audience" (Creswell, 2007, p. 182).

I provided the key learning experiences of participants that have significant meaning in their lives, are identified as turning points, were helpful in life transition, influenced the rest of their lives, or explained participants' life perspectives.

As agreed, all participants chose to be anonymous. Their names were replaced by letters A, B, C and D. All four participants are from different classes in Beijing Open University for Older Adults. Coming from different family backgrounds, life styles and preferences of priorities in life, their life stories are authentic and unique, and a lot to be explored from their stories.

4.1 Mr. A

Mr. A is 63 years old, divorced and with no children. He is the only male and the youngest among the four participants. I met Mr. A in the advanced computer class, where he was a classmate with the popular student Ms. Tang introduced to me. When he asked me what my purpose was in coming to the class, I told him that I intended to interview some students in the class for my research. I explained to him a few details about the research and he seemed very interested. Then he said, "You want to know what retired older adults are doing? I will show you." He sat in front of a computer and showed me a blog which he has learned to write in his class. Then he explained that he had recorded everything that had happened in his retirement and what he observed other retired older adults had done.

It was quite interesting talking with Mr. A, as I found that there was something different about him and his experiences. He is a typical guy, born and raised in Beijing, who enjoys learning in informal activities, such as playing chess, reading novels, and attending all kinds of activities. People who were born and raised in Beijing live their lives with fewer worries compared to people who came from other cities to make a living in Beijing, because people who have always lived in Beijing have enjoyed better benefits. The preferred way of learning for boys in Beijing is through playing sports, games and other fun things. It is typical informal learning from varied experiences. Mr. A is one of these people.

Mr. A was born in 1951 in Beijing. In 1964 he went to Qing Hua Fu Zhong, which is a middle school well-known for high quality teaching and terrific academic achievement among students in Beijing. However, two years later the Cultural Revolution was implemented and all schools were closed and students were required to go to the countryside to perform labour. Mr. A and his classmates were sent to Yan'an in Shanxi province, where the Chinese revolution originated. The labour work was hard during the day, but Mr. A and his classmates brought books with them to read during breaks. They brought novels, books in foreign languages about science, etc. Although they were deprived of the right of going to school, they were still eager to learn whenever they could. Mr. A loved to read books on different subjects, especially history, politics and literature. He managed to read as many books as he could during his four years' stay in Shanxi. After he came back to Beijing in 1973 Mr. A was assigned to do house-keeping in a very good hotel in Beijing, but he did not go and tried his best to look for jobs that he would enjoy. So for one year Mr. A did not work at all. Then he found a job at Beijing Manufacturing Company of Special Arts and at the age of 22 became a bench worker in charge of repairing

machines. At 22 he was too old to start as an apprentice so Mr. A had to learn everything by himself from the beginning.

In 1977 the Cultural Revolution came to an end and schools were opened. Mr. A registered himself in the first national university entrance exam. He still wanted to improve himself through education. Before registration, Mr. A made a careful evaluation of his education background and his advantages in study. "I only finished middle school and was not very good in physics and chemistry. I was more confident in the humanity subjects, including Chinese, math, politics and history, so I registered in exams on the humanities". After registration, Mr. A attended night classes to catch up on high school knowledge. Two months later, he took the national university entrance exam and got 313 points out of the full mark of 400. "At that time, students needed to get 260 out of 400 in order to be considered for study in universities and the entrance rate was 1 out of 40, which means I did quite well on the exam." That is how Mr. A became a major in Chinese literature at Beijing Normal University.

Mr. A spent four years in the university. He learned more about Chinese literature and sat in the most famous teachers' classes, from which he felt that he had so much to learn. However, Mr. A was not a student who liked rigid learning. Except when studying, Mr. A spent lots of time having fun as well. He was the main member on the soccer and chess teams. One year he won second place in the chess competition in Beijing Normal University, and the person who won first place used to play on the Chinese national chess team. Mr. A was a very smart and energetic person. He had a lot of fun in university. He recalled, "I had the best years of my life in the university. I was able to do everything I enjoyed".

After graduation in 1981, Mr. A was assigned to 208 Light Weapon Research Institution. There he taught Chinese to employees' children. He worked there for three years, then was

relocated to the Ordnance Division in town and worked in the Association of Weapon Industry as a writer and editor. His main responsibility was to interview retired employees regarding the history of weapon development in China and write interview reports. But Mr. A felt bored; he found the job was not challenging enough for him. “I felt that my talent was not fully exhibited in that job.” So he changed jobs again, moving to the School for Municipal Government Employees in 1984. There he taught Chinese until 1987. In 1978 reformation started in China, which involved reformation of the economy, operation of state-owned and privately-owned enterprises, and education. The reformation started only in a few cities first then become national wide from 1983. The reformation in education included not allowing individual enterprises to run their own schools anymore, and the school where Mr. A taught was dismissed, so Mr. A was transferred to another department in charge of education-related issues. Besides teaching, he interviewed people who worked with excellency. Mr. A found the job interesting; however, he did not find the work fully represented his values. He had written lots of reports at work but nothing relevant to his interests until he started travelling after retirement.

Mr. A retired at the age of 56, earlier than the mandatory retirement age of 60, which is a common case in China. As there are too many people in China, employees who are close to their retirement age are sometimes asked to retire early in order to give work opportunities to the younger generation. When Mr. A was asked to retire early, he actually felt happy. He recalled, “I would rather have retired earlier than required, so that I could have more time doing what I enjoy”. After retirement, Mr. A learned to operate a small business by himself. He sold jeans, small decorations for cars and post cards. He also learned to make the Business Operation and Binding of Circulating Renminbi. In China, the government issues new currency from time to time, so the older edition of the currency is then off the market. Some people who still have the

complete edition of the old currency decorate it and sell it in the market. Because it is old, it is considered antique and can be sold at a higher price. Mr. A started to do the business and became more and more experienced. In 2008, Mr. A could earn 100 Yuan through one transaction, but he had kept some to himself. With time, the value of the older edition of the currency has soared and could be sold at 10,000 Yuan. Mr. A has actually learned quite well when to keep and when to sell.

Mr. A also has good knowledge about the stone market. It is a typical Chinese market where people collect precious stones and store them until the market price of stones grows up. Mr. A also became one of those people and he was interested in Balin stones, which are used to carve personal seals. He read lots of books about the Balin stone so that he could learn how to assess the quality of the stone. Mr. A's friend had connections with factories outside Beijing, who got Balin stones from mines and sold them. In order to have easy access to the big market in Beijing, the manufacturers brought their good quality products to Mr. A and his friend, so that they could help with the selling in Beijing. Without advance investment, Mr. A and his friend can benefit from the business, which was a big advantage. With the actual stone in hand, the knowledge accumulated as well.

After more than 10 years of experience doing business, Mr. A decided to stop his business and start a new life in 2013. He has had different experiences and accumulated abundant wealth. Now he wanted to relax at home for a while. Mr. A tried to have fun in his free time and started to play computer games, but he didn't know how to download the games and install them, so he asked his neighbour to help him. After a while he felt bored with the computer games and he found that when he sat for a long time in front of the computer he started to have

back problems and his eye-sight became worse. So Mr. A decided that he should go out and do something that is good for his health, and that was how he decided to start travelling.

Mr. A travelled a bit to different cities in China. He felt that life became exciting again. He visited different places and saw people with vigorous and various life styles, all of which inspired his curiosity. He wanted to record everything he saw on his trip and show other people what he saw. But how? That was the main reason for him to register in the computer class in Beijing Open University for Older Adults. Mr. A knows that computers have become a practical tool for effective communication today and he has also heard of blogs. If he knows how to write blogs, he could share his experiences and let people know about life outside Beijing.

In an open exhibition about services provided to older adults, Mr. A found that Beijing Open University for Older Adults provides classes for retired older adults. It is one of the top universities for education quality in Beijing. So Mr. A registered in the intermediate and advanced computer classes at the university. “I decided to take classes in this university because it is famous and the fee they charge for each class is cheap. To enroll in one class cost 400 Yuan, but if you register in two classes, you get a discount, 400 Yuan for two classes”. Now Mr. A knows well how to write blogs online as well as adding photos to his blog, as he found that if there are only words in the blog, not many people are willing to spend time reading long paragraphs. Once he adds photos, there are more readers. People like to experience more visual impact and get a direct knowledge of the place by obtaining a visual impression. From 2013 till now Mr. A has written 170 articles about his travels, which he has enjoyed a lot. He said, “I have never been into writing this much. Finally I am doing what I want to do and have shown my talent in writing.” Through his blog, Mr. A has made new friends from all over the world and he started to reconnect with his old friends on the Internet. Now he feels content about what’s

happening in his life. He told me that “some friends even introduced a nice woman to me in Shanxi. We might get married soon and I plan to buy an apartment there so that I can start a new life there.”

There were still things Mr. A wanted to learn after the computer class. As he put photos in his blog, he would like to learn professional photography, so that he will be able to take more beautiful and professional photos to show people. He plans to register in the photography class. Learning has changed his life completely; he finally found his worthiness in the years of his retirement.

Mr. A is a lifelong learner who prefers informal learning. His experience strongly demonstrates that learning can help a person search for the meaning of his existence, his worthiness, and can bring fun and happiness to life. Learning brought changes to his life. When he finally learned to blog, he started to become socially active. Mr. A has finally started doing what he loves to do in life. He had not found his self-worthiness until he retired and started to write blogs. He also started to influence others by introducing the world to other people, sharing his ideas and experiences in life.

4.2 Ms. B

Ms. B was introduced to me during a class break. She registered in the keyboard class held every Wednesday. Ms. B has been learning keyboarding in the university for quite a while. When I talked with her, I understood that she also had an urge for learning ever since she was a little girl, and learning is one of her hobbies. She has the persistence to keep learning through her life, so I chose her to be one of my participants.

Ms. B is 67 years old, married, with two daughters. She was born in 1946. Ms. B went to middle school from 1960-1963. She was always eager to acquire new knowledge and loved reading books. There was a bookstore close to her school, where she often went for reading

during the whole lunch break. She read a lot when she was at home; her mom even complained that she spent so much time reading that she even ignored her housework duties. However, after middle school, Ms. B decided not to continue to high school, which was normal at that time in China. Because most of the Chinese families were poor and there was more than one child in a family, so the eldest child needed to share with the parents the responsibility of supporting the family. Ms. B is the second oldest in the family. When she finished middle school, her elder brother settled in the countryside as a member of an agricultural production brigade, which was advocated by the Chinese government from 1960 on. Most of the educated youth were sent to the countryside after middle school or high school during that time. After her brother left, Ms. B became the eldest in the family. She had one younger sister and one younger brother to take care of at home.

After graduating from middle school at 15 years of age, Ms. B was assigned to work in the Beijing Building Design Institute. She worked as a draftsman on the construction design team. Since she was only a middle school graduate, she had no idea how to do the work except to learn from the very beginning. Her trainer was a senior draftsman on the team. There was no specific training period assigned. Ms. B needed to learn from practice and work with her trainer until she could work independently. She learned how to read construction plans and got to know the importance of every line on the construction plan. While she was at work, she always hoped for a chance to continue her education. Unfortunately, a series of social movements started from 1964 until the end of the Culture Revolution; education was totally stopped in China. Ms. B concentrated on the draftsman's work until 1969. When the Cultural Revolution began, everyone who was educated was sent to the Wu Qi Gan Xiao in the countryside to perform labour.

Wu Qi Gan Xiao was established during the Cultural Revolution. It was a place in the remote countryside where intellectuals were sent to perform labour. The intellectuals were regarded as exploiters who did not do physical work at all. So according to Mao Zedong, it was mandatory for the intellectuals to go to Wu Qi Gan Xiao to learn how to perform labour and experience personal reformation. Ms. B did laboured there for two years. By the end of 1971 she was transferred to work in the Building Research Institution. Ms. B still did draftsman's work, but this time she worked in the magazine editing department. At that time, the pictures in the magazines still needed to be drafted by hand before printing. Ms. B was in charge of drafting the pictures as well as proofreading. In 1977, the national university entrance exam reopened and there was an opportunity at Ms. B's workplace that enabled her to fulfill her dream of continuing education. The Building Research Institution was connected to one of the universities in Hangzhou. Candidates who passed the national university entrance exam could study there. Ms. B immediately registered herself for the exam. Her workplace provided training to help candidates with knowledge needed for the exam. The training was held after work at night for two months before the exam. Ms. B took the training and found high school knowledge not so difficult, since she had a good knowledge base from middle school.

Ms. B passed the entrance exam at the age of 38 and became a university student. At that time, she was married and already had two young daughters. If she went to Hangzhou University, she had to leave her husband to take care of everything at home in Beijing, which could be hard for a man. Considering the situation, Ms. B hesitated, but her husband was very supportive of her for pursuing further education. So Ms. B went to Hangzhou to major in archives, which was decided by the Ministry of Metallurgical Industry. During these two years, life was hard. There was barely enough money and food to support the family. Ms. B tried her

best to finish her study as soon as possible, so that she could return home early to help her husband. Even though life was hard, Ms. B still enjoyed her time studying. She learned a lot in university, including history, English, editing, file searching, archiving and quality control. All this knowledge helped her a lot later in her new job.

Ms. B finished her study in two years and came back to Beijing. She started to work in the library of the Beijing Building Research Institute. “A lot of people don’t know what a librarian does at work. Actually we could be quite busy from time to time.” There was a heavy workload in the library; a lot of manual work needed to be done, especially in the old times. Ms. B started with purchasing. In order to purchase the right books, she needed to understand specific techniques. She talked to people in charge of each department and asked for their advice. Then she began categorizing books, which required her good knowledge so that the books could easily be found. She learned to make indexes as well. Although from time to time she was really busy, she still found time to read books and magazines, which kept her up to date with the latest technology and developments in the building construction area and society. Ms. B worked in the library until she retired in 2001 at the age of 55.

Unlike people who feel lost after retirement, Ms. B feels only freedom. Finally nobody can control her timetable. She can’t wait to go out with her husband and do exercises. For two years right after her retirement, Ms. B started to exercise together with her husband to keep healthy. They went to Fragrant Hill twice a week. With no more work pressure, she felt so comfortable, relaxed and happy. Then her eldest daughter had a baby. Ms. B helped to take care of the baby until the granddaughter reached school age. During this time, Ms. B still kept herself busy and entertained. She planned on learning to play the keyboard by herself. She had this learning intention because there was a keyboard at home. Ms. B first bought some books to study

at home and tried to practice by herself. But when she met problems or had questions, she had nobody to ask for help, so she decided to register in a class for keyboard playing when her granddaughter started school.

She first registered in a keyboard class in the Longevity Club, but the teacher did not teach very well. She only tended to entertain students without teaching them real knowledge. When students asked her questions, she sometimes told them that it is not necessary for them to know, because the knowledge might be too difficult for them to understand. “When we ask her questions, she always say that you don’t need to know this; if I told you won’t understand”. The teacher’s attitude made Ms. B feel that the teacher was not responsible and disrespectful to older adults, so she stopped going to classes. Later, Ms. B heard from a friend that a very good keyboard teacher was going to teach in Beijing Open University for Older Adults. As soon as the class was confirmed, Ms. B registered.

This time, Ms. B was not disappointed. The teacher was responsible, patient and fun to learn from. Students learned from notes. In each class they could learn some professional knowledge. The teacher taught in a fun way so that students can remember well. By now, Ms. B has been learning to play the keyboard for almost 10 years and is already able to read notes of a whole simple song and knows how to play with both hands. She really loves playing the keyboard, which brings joy to others and herself. “If I play well, I can bring enjoyment to others as well.” Ms. B keeps a busy schedule and has enjoyed her retirement life. But no matter how busy she is, studying the keyboard will always be on her schedule. Learning has become her habit and part of life; she always seeks opportunities to learn. She feels self-contented through learning.

4.3 Ms. C

Ms. C is 70 years old and married, with two children. She has been studying at Beijing Open University for Older Adults for a while. She has studied Traditional Chinese medical science, nanny skills, handcrafts and now she is in the gourd flute class. I met Ms. C in the university's administration office. I heard her talking with the administrative officer about how many classes she has already taken, her experience in classes and how she has worked with older adults before and her suggestions to the teachers. I was interested in her experiences and wanted to know more about her. Ms. C was very talkative. When I told her that I wanted to understand older adults' lifelong learning experiences, she said, "When I was younger, everyone said I was a wonk." She was so confident when she said that. So I decided to interview her and get to know her experiences learning and working.

Ms. C was born in 1944 in a highly qualified intellectual family. She has one younger brother and one younger sister, but she is the only one who inherited all the intelligence, arts and sport genes from their parents. Her mother taught her how to play ping pong, swim and skate when Ms. C was young. Her mother also taught her music knowledge so that she is able to read notes and play musical instruments. Ms. C went to middle school in 1958, the school she went to belongs to the Chinese Academy of Sciences. During four years of middle school, high school and university knowledge were also taught because students in these classes were supposed to continue studies in Russia. However, starting in 1957, the relationship between China and Russia became tense, so students could no longer go to Russia for their studies, so they were assigned to continue to study in the Chinese Academy of Science. Ms. C studied organic analysis in chemistry. After graduation she was assigned to a chemistry institution. The program in the Chinese Academy of Science provided students a university diploma at graduation; then students started working in the Academy. At that time, nobody wanted to go to a chemistry institution, as

the work was dangerous. People were exposed to poisonous materials at times and there was not much funding available to the chemistry institution, so nobody would choose to go there.

Ms. C was the youngest in class, so she had no chance to choose. She had to follow the assignment to continue studies in the chemistry institution. Although it was not the institution Ms. C would prefer in the first place, she still enjoyed studying and working there, as she was attracted to the new knowledge and challenges, and she enjoyed the title of the smartest student in class. As the youngest student, Ms. C showed her talent and intelligence. She could memorize the equations more quickly and she concentrated on studying better. “When all others were busy looking for girlfriends or boyfriends, I just concentrated on study; that’s why I studied better.” In 1962, Ms. C graduated and started to work in the Chemistry Institution. She worked in the same office as Mr. Qian Xue Sen, who is the father of missile technology in China. He also participated in the research for the first atomic bomb in China. At that time, Ms. C worked with Mr. Qian on the atomic bomb project and helped to make protective blocks installed outside the nuclear reactors. The protective block was made of lead. It covered the reactors so that during the experiments it could protect people from radioactive rays.

Ms. C actually enjoyed this working experience a lot, as she learned a lot from Mr. Qian Xue Sen, and his devotion to work greatly inspired Ms. C. She felt that people who have received a good education usually possess good manners and a good attitude to others and to life. Ms. C made Mr. Qian her role model at work; she hoped that she could become such a person in the future. Unfortunately, at the age of 40 Ms. C was diagnosed with a liver problem due to frequent contact with poisonous chemical materials at work. She was not able to continue to work, so she left her workplace and came back home to recover from her illness. However, in

Ms. C's case it was not considered a retirement and she was not entitled to have the benefits of retirement. She was paid less than retirement payments.

Ms. C spent the first five years of her leave at home getting treatments. During those five years she mainly stayed at home taking rest and keeping a pet, but she felt so bored. She thought that she should do something, so she decided to learn to play Taiji. At age 45, Ms. C started to go to Taiji class delivered by the Physical Culture and Sports Committee of Beijing. She learned different styles of Taiji. She remembered all the instructions of how to play, then practiced the movements, and finally comprehended how to play with "Qi" which is considered the origin of life and should travel smoothly through the human body, so that it brings healing. Ms. C was so into the practice of Taiji that she kept learning and practicing for eight years altogether. During those eight years, she also passed tests and became a professional instructor and referee of Taiji.

With the professional recognition, Ms. C began to teach others how to play Taiji. Most of her students were older adults with various illnesses, wishing to recover by doing exercise. When Ms. C taught Taiji, the classes usually started early in the morning, from 6 am to 12 pm. She had to be at the location around 5 am to prepare. Students could drop into the class anytime they like from 6 am to 12 pm, but Ms. C had to stay there the whole time and keep talking to the students and showing them how to do the movements. It was really hard work, but Ms. C enjoyed it a lot. She got the chance to talk to older adults and she resonated with some of their experiences. She made some good friends and also developed a method of working with older adults. She noticed that this work gave her a better disposition. She also learned that people should not judge older adults by their appearance. Though they might look tiny and fragile, they might have fulfilled important roles in their workplace before retirement and they still possess great talent. People should treat them with respect.

With the practice of Taiji together with the treatments, Ms. C's health improved. Her learning instinct told her that she should learn something else, but Ms. C had no idea what to learn next. At this time, one of her friends suggested she go to Qingdao, where her friend's friend had opened a school to teach Qi Gong, another type of Chinese Kongfu using "Qi" as well. They knew that Ms. C had learned Taiji and they said the two are similar, so they suggested Ms. C go to Qingdao to help with the operation of the school. Ms. C agreed to go and helped with the administration, finance and management. In the meanwhile, she had the opportunity to sit in classes. She was most interested in the traditional Chinese medical treatment class. She sat in every class and found that the teacher might not be professional. He taught very slowly and did not elaborate clearly on certain knowledge, which aroused Ms. C's curiosity. She wanted to learn systematically. So after she quit the job in Qingdao, Ms. C came back to Beijing and registered in a Traditional Chinese medical treatment class provided by the Adult Education Bureau in Xi Cheng District in Beijing.

Ms. C loved learning the traditional Chinese medical treatments. She started in 1990, spending three years on the study, and graduated with an official diploma. While she studied, she forgot to eat. She did not have time to watch TV since there was a lot to remember in traditional Chinese medical science. The class was difficult and required a lot of concentration. Ms. C studied really hard and, with all her previous learning experience, she was still the best student in her class, although she was the oldest. She was the monitor of the class and teaching assistant. After class, if her classmates had any questions, they would come to Ms. C for help. She even helped teachers think of questions for the exams. After Ms. C graduated with Excellency, she started working in a hospital in the department of acupuncture. She worked in the hospital for

three years. Then Ms. C's grandson was born and someone was needed to take care of him, so Ms. C quit her job and returned home to help take care of her grandson.

Ms. C did not give up learning Chinese traditional medical science even when she stayed at home. She would buy books and read in her spare time. She also watched TV programs about the relevant topics taught by experts to improve her knowledge. She even started to give others acupuncture treatments and received good feedback. She felt that she had made another big achievement in her life. After a few months of her stay at home, Ms. C's son got a divorce. At that time the grandson was only one year old, so Ms. C put almost all her time and energy into her grandson. Ms. C was lucky that she was not affected by the Cultural Revolution. She had received very good education and her talents were developed, but her children became victims of the revolution. They did not receive any education, so none of her children like studying much. Therefore, Ms. C did not think that her son would be a good influence on her grandson regarding his educational development, so she planned to start her next big project, to help with her grandson's education from his childhood.

Ms. C tried her best to provide her grandson with the best learning opportunities. She also taught him at home. She started to teach her grandson to read Chinese characters when he was a year and a half old. At the age of four, her grandson started to learn how to write Chinese characters. As long as he could speak the word, he was able to recognize it. Ms. C required him to be able to write words that he recognized. Ms. C was very strict with her grandson. She did not allow him to spend time on any meaningless video games. Instead, she let him learn to play musical instruments. At the age of eight, her grandson won first place in the national wide drum competition and now he can play eight types of western musical instruments. When her grandson went to primary school at the age of seven, he already knew 600 English words and had the

knowledge of a grade three student. Two years ago, Ms. C's grandson started studying in a renowned middle school in Hai Dian District and Ms. C did not need to put as much energy into her grandson as before, so she finally got to relax and do something she would like to do.

In 2012, Ms. C organized a keyboard class for retired older adults in her community. She helped invite a famous musical instrument instructor to teach. The instructor prepared his teaching materials to fit the way older adults learn. Within half a year, by delivering 24 classes, all students in his class were able to play more than 10 songs with two hands. Ms. C and her classmates practiced very hard at home and their final performance was excellent and received very good feedback from the audience. But the classes stopped after one year because the instructor was 80 years old and it was hard for him to travel to class anymore. As learning had become a habit in Ms. C's life, she continued looking for other learning opportunities.

One day Ms. C saw in the newspaper that there were classes offered by the Beijing Open University for Older Adults and she decided to go to the university and ask for more information. After doing her research, Ms. C first enrolled herself in the nanny class. She explained that "Because I enrolled in the nanny class doesn't mean that I want to be a nanny; it is because I want to know what the right things are that a nanny should do. Because my daughter had just given birth to a baby, if we need to find a nanny, I will make sure the nanny does everything correctly, because they are so expensive and I want to make sure that what they do is worth the money." Also, after attending this class Ms. C found that many things she did before concerning the health of women who had just given birth were not correct. Since the nanny class, she is more confident that she can take better care of her family.

At the time of the interview, Ms. C attended the gourd flute class. First of all, she thought that music can bring joy to people; then playing a musical instrument helps older adults exercise

their hands and brain so that they don't get Alzheimer's disease. Ms. C enjoys learning with her classmates. She is not the best in class but not the worst neither. Students in her class encourage each other and help each other in learning and practicing; it feels like a big family. Ms. C started learning in this university from beginning of 2014. She has already completed two classes and she still wants to take more classes. She has lots of free time to herself nowadays. Her husband works for the Hai Dian Municipal Office. He travels to cities outside Beijing often. Even when her husband is in Beijing, the two of them live a very liberal life. They don't affect each other's personal life, they eat separately and they keep their own salaries, which is very rare for people of their age. Ms. C does not let others distract her in her pursuit of learning, because she knows that when the day comes that she has to depend totally on her children, she will be well prepared through learning, so that she won't bother her children a lot. Even if she needs to live with the children, she will have her own space and territory, and with the skills and knowledge she has acquired she will still be able to entertain herself without disturbing others.

Ms. C is very active in pursuing lifelong learning. Like Ms. B, learning is part of her life and habit. In the meanwhile, the love of learning has made her socially active. She loves to work and study with older adults. She is also capable of organizing social events and finds learning opportunities for other older adults as well.

4.4 Ms. D

Ms. D registered in intermediate and advanced computer skills classes in the university. She attends two classes every Wednesday. She is an active and popular person in and outside the university. Ms. D was recommended to me by the office manager in charge of Beijing Open University for Older Adults and she is the first student I met and interviewed. From childhood Ms. D has lived a life of remarkable hardships, considering her family background against the chaos in Chinese history, which motivated her to live a retired life with a devoted and love-

spreading heart, a determination of loyalty to herself and self-actualization. After a brief conversation with her, I could feel her outstanding character and was amazed by her learning experiences and social activities, so I decided to include her as a research participant.

Ms. D is 72 years old, widowed, with two daughters. She was born in 1942, in a family of intelligentsia. Her father was a teacher at the school sponsored by the Guo Min Dang (Nationalist Party). He was well respected at work and had received thirteen certificates of appointment from the school, inviting him to continue teaching in the school. Her mother died giving birth to her on the way to work in the countryside. Ms. D was saved by villagers and was brought up by her father. In 1957, Ms. D went to high school at Beijing No. 15 Middle School and started to work in 1961. In those years in China, under the planned economy, once people finished school they would be assigned to different workplaces regardless of their interests and skills, and individuals must obey the assignment. However, Ms. D did not accept the assignment, because she wanted to find a job that was suitable for her.

From 1961 to 1965, Ms. D worked in different jobs, such as teaching night school in Beijing People's Broadcasting Corporation, working as an accountant in a dining center, and working as an administrator in an office. Finally, she found the most exciting and enjoyable work for her, becoming a teacher in primary school. She first started teaching in a primary school where she met her husband. But she did not want to work in the same school with her husband, so she found a job in Lao Qiang Gen No. 2 Primary School in Xuan Wu District and worked there until retirement in 1995. In 1966, the Cultural Revolution, which was political chaos, began. As Ms. D's father had worked in the school of the Nationalist Party, he was considered a rebel and suffered strong criticism and denouncing. Ms. D's work has been affected because of her family background. She had to obey everything the school ordered her to do, otherwise she

could be fired and revealed as the daughter of a rebel. In that case, she would receive the same criticism and denouncing as her father, which means that her life would be ruined.

Luckily, Ms. D managed to stay safe through the Culture Revolution. But she did compromise a lot. She had to be 100% obedient and could not do what she wanted, which was totally against her nature. The situation became a lot better after the Cultural Revolution. However, due to the identity of her father, Ms. D was not allowed to pursue further study in the university after the Cultural Revolution. There were a lot of things that she had to learn by herself aside from teaching. For example, she learned Pinyin all by herself before she could actually teach students. Ms. D kept teaching in Lao Qiang Gen No.2 Middle School until she retired in 1995 at the age of 53.

Ms. D was not used to the quietness of retirement. She had worked with small children for 30 years; she felt lonely in retirement. She was eager to make new friends. During the first two years of her retirement, Ms. D lived with her daughter while taking care of her grandchild. She bought a lot of books to read at home. At that time, her apartment was under renovation. Right after the renovation, Ms. D moved back to her own place and started looking for opportunities to go out, make friends and continue to learn. As Ms. D said, “I have to keep learning, especially in the modern society like this. It is an era of technology; if you don’t keep learning, you know nothing. A person lives in the society, and he/she should keep in touch and keep updated with the latest information; otherwise you will fall behind. If you have nothing in common with others, no one would like to be friends with you.”

Right after returning to her own apartment, Ms. D started looking for schools that provide classes to older adults. She first registered in the calligraphy class in the Xuan Wu University for Older Adults, but she found herself losing interest quickly. As a hot-tempered person, Ms. D

could not bear the slowness and patience required to practice the calligraphy and she had no patience listening to teachers explaining how to write calligraphy properly, so she stopped taking classes after one semester. Then in 1998, she enrolled in a class in Beijing Guang Ming Chinese Medical Science College. She would love to learn traditional Chinese medical science so that she could help others with her knowledge and skills. Since her life was saved by strangers, Ms. D believes that there are a lot of nice people in society and she should in return do something to repay society for its kindness.

In class, students practice skills such as acupuncture on each other. With the growth of knowledge and experience in practical Chinese traditional science, the urge to give others treatment has grown stronger in Ms. D. Unfortunately, her experience was not recognized by her neighbours or friends. Ms. D felt disappointed and upset; she really wanted to do something for others. Then one day a friend told her that she might be helpful taking care of older adults in nursing homes. So Ms. D went to visit one of the nursing homes in Beijing. She found that some older adults in the nursing homes were from “five guaranteed families”, which means those people are aged, infirm old widows or orphans, with no children. They receive help from the government, which includes food, clothing, medical care, housing and burial expenses. She found that these elders really needed to be taken good care of. Some of them were in very bad health, so Ms. D decided to do her best to bring care to these people with her skills in Chinese traditional medical treatment. Ms. D graduated two years later with a certificate of proof in delivering Chinese medical treatments. With the certificate, she felt that she was ready to help in nursing homes.

In 2001, with the knowledge she learned, she went to visit social welfare institutions and gave traditional Chinese medical treatments to older adults who lived there. Her skills were

recognized and people warmly welcomed her visits. That is how Ms. D's career of volunteering began. During her volunteering, she brought some of her friends with her; some of them became volunteers as well. Ms. D's volunteer team has grown bigger. She became well-known for her skills in traditional Chinese medical treatment. People come to visit her for treatment. Her volunteering has also drawn public attention. Journalists came to visit and interview her regarding her good conduct among older adults. While Ms. D was concentrating on her volunteering career, bad news came when her husband got cancer. He passed away in 2002, which was a great shock to her.

After her husband passed away, some of Ms. D's friends tried to introduce her to some nice men, hoping that she could remarry and have company in the late years of her life. Ms. D felt thankful but refused to consider marrying again. Her consideration is that if she got married again, she would have responsibility to the family and she wouldn't have time to do what she wants to do. Being single gives her opportunities to put all her time into learning, making friends and volunteering. With a fully scheduled daily life and with friends around her, even without a spouse, Ms. D never feels lonely. Besides learning and volunteering, Ms. D regularly wrote short articles about her volunteering experiences and her experiences learning traditional Chinese medical science. Some of her articles were published in newspapers and magazines and won prizes in competitions. She became well-known among people who are or work with older adults. People even contact her for opportunities to do volunteer work with her.

In 2011, a group of students from Tsinghua University contacted her, wishing to join her for volunteering, so Ms. D started leading students to visit nursing homes and social welfare institutions. Now there are more student groups in her team and it has expanded to 2000 to 3000 people. They sometimes buy small gifts for older adults, give performances and give traditional

Chinese medical treatment as well. The treatments given have achieved good results. Older adults feel more comfortable and healthy after treatment. Ms. D feels content that she brings love to people and spreads the merits of Chinese medical science.

In 2006, Ms. D found Beijing Open University for Older Adults in Hai Dian District and enrolled in a computer class. Once she learned how to use the computer to log onto the Internet, she started her own blog to let people know what the volunteers are doing and what older adults' lives are like. She also learned how to use a video camera online to improve the efficiency of her treatments, so that she can give treatments by looking at symptoms on the camera. By learning to use the Internet, Ms. D felt that her volunteer career has been greatly motivated, because more people know what she is doing and want to join the team. She is leading a very happy and active life, full of energy. She had made lots of friends by going to classes and doing volunteer work.

While taking computer classes in the university, Ms. D has kept learning Chinese traditional medical science. She goes to Tsinghua University regularly to attend Chinese traditional medical science classes. Ms. D possesses a passion for volunteering. She is an active citizen of the city and she has brought positive images of older adults to the public. For her, learning is the means of fulfilling herself and a tool to serve others by contributing her knowledge and skills.

This chapter has presented the life story and lifelong learning experiences of four participants. Each of them has different purposes and preferences for learning. They have different plans for life and have all made achievements in their retirement. We can find lots of differences among these four participants, but they have similarities as well. In the following chapter, we will conduct a thorough analysis of the similarities among these lifelong learners,

their perspectives on successful aging and on the lifestyle that older adults should enjoy, and how learning can bring changes to older adults.

Chapter Five: **Successful Aging and Lifelong Learning**

Researchers believe that “the more active, healthier and educated older adults are, the less drain they are on family and community resources and services” (Merriam & Kee, 2014, p. 218). In order to change the public’s view, we need to help older adults to become more active, healthier and better educated, all of which falls into the framework of successful aging proposed by Rowe and Kahn (1997), that a quality life should be one that avoids diseases and disabilities, maintains high physical and cognitive functioning, and engages in social and productive activities. Meanwhile, education is important, since it encourages older adults to participate in social activities and improves quality of life (WHO, 2002). Thus, learning has become a strong facilitator of successful aging. Learning can keep the brain active (Formosa, 2010b), broaden horizons (Withnall, 2012), and enhance social interaction. It also “develops social competencies and promoting shared norms and tolerance of others” (Field, 2009, p. 23).

However, people age differently due to gender and ethnic and cultural background. Their understanding of a quality life and successful aging can vary accordingly (WHO, 1999). In order to obtain a clear idea of how lifelong learning facilitate successful aging in China, we need to understand Chinese older adults’ perspectives.

5.1 Chinese Older Adults’ Perspectives on Successful Aging

5.1.1 *Physical and psychological health*

The concept of successful aging had already become popular in the western world by 1980, but it is still a new concept and is unfamiliar to Chinese older adults. When I asked my research participants if they had heard of the term successful aging, I saw faces of ignorance. “I always hear people or the media say we are going into an aging society, but I have not heard about successful aging,” Ms. B said to me. When I asked the participants what their interpretation for successful aging would be, I got different answers. However, all of them

mentioned that good health is the top priority over everything else in order to have a quality life in retirement, so doing a certain amount of exercise is necessary. Ms. B commented:

I think it [successful aging] means that you get old, but our body, mind should all be healthy. [The purpose that] Older adults attend class is to improve the quality of their lives. For example, some people like to edit photos, they go to computer class, so that they can use the computer to make their photos look better. It is also a way to improve their life quality. Also, I think it is not only about satisfaction in material things; it also involves satisfaction on a spiritual level.

However, there are lots of retired older adults in China who lead an unhealthy life style. In order not to be bored, they invite people over to their place, sit at home and play poker or Mahjong all the time. Ms. D mentioned that “the activities they do are bad for their health, and sometimes the activities destroy friendships as well. If they lose money, they won’t be happy. It is negative aging; we need positive aging.” What’s more, the participants also noted that physical illness can cause bad emotions and attitude. Ms. C said

I have not [heard about successful aging], but when I had problem with my liver, I had really bad temper, which was caused by the disease. Now I am healthy, my temper becomes good, especially when I started to work with old adults. I have never quarreled with them. We are always on good terms.

Good health can help older adults become more active and socially engaged. Merriam and Kee (2014) explained in their research that “Successful aging has also been expanded to include attention to psychological and spiritual wellbeing” (p. 133). Physical wellness can enhance psychological wellness. Older adults need to adjust their mindset in retirement, especially those who used to be in control in important positions. These people were usually surrounded by people and flattered at work. It is most important that they learn to adjust their thinking in retirement, since retirement means losing their former authority. Without authority and retired at home, will not be as many people around as at work. This sudden change in life is

hard for some people to adjust to, and they simply become lost and frustrated, quiet and unhappy. As Ms. B gave me an example of these people

I know some people, they are unhappy after retirement. They were usually leaders at work. They enjoyed having others following them and asking them for help. When they retired, nobody is following them and flattering them, because they don't have power anymore. They can't feel their importance anymore. It is difficult for them to deal with a situation like this, so they think of ways to get people's attention, or they become depressed and quiet. People like us, we were ordinary workers. We did not have power, so nobody tried to flatter us. We always had a peaceful life either at work or at home; there is not much difference after retirement. So it is easier for us to adjust.

According to Shultz and Wang (2011), retirement means to withdraw from work both physically and psychologically. It corresponds to less stress and responsibility toward others (Levinson & Levinson, 1996). Retirement is considered a process of decision-making (Wang & Shi, 2014). Once an individual decides to retire, he/she will gradually retreat from the workplace and put more time into family life and leisure pursuits (Chevalier et al., 2013; Shultz et al., 1998). However, not all retirements are voluntary (Gallo et al., 2000; Szinovacz & Davey 2005, Solinge & Henkens, 2007). For those who are still very productive and enjoying work, it will be more difficult, and they need more time to adjust themselves to retirement.

5.1.2 *The joy of social engagement*

Although none of my participants had heard of successful aging, they all mentioned the word 'happiness' when talking about retirement. I tried to find out what can bring happiness to older adults and to my surprise, my participants all mentioned the importance of social engagement. Ms. B told me that

Most retired people want to live every day happily. Besides doing exercise and having good health, they hang out with friends. Don't lock yourself at home. For those who lost their spouses, they even need more friends to hang out with them.

Ms. B has a very busy schedule every week. She goes to keyboard class on Wednesdays, dancing on Thursdays, and on Fridays and Saturdays her grand-daughter comes over. Ms. B needs to take care of the grand-daughter and takes her to keyboard class every Saturday. The rest of the week Ms. B has a lot of housework to do, as well as spending time practicing on the keyboard and getting some rest. She is very happy about her life. “I like to get busy, it makes me energetic.” According to Herzog and colleagues “quality of life is related to any kind of activity—physical, social or any combination of the two...People who do more things enjoy a higher quality of life than those who are more sedentary and isolated” (p. 595).

Mr. A travels a lot. Except when attending classes, he spends most of his time outside Beijing. “I have to go out to see what I haven’t seen while I am still capable of traveling.” In his opinion

All retired people try to have fun in life and not get bored. I need to be active, go out making friends. A research which I read on the Internet said that in order to have a happy life, one older adult needs to have at least 16 friends in retirement. A typical Beijinger’s perspective of life is to have fun. I would prefer to hang out with peers who have the same attitude toward life.

Right now, he plans to buy an apartment in Shanxi province where he was sent as a member of an agricultural production brigade during the Cultural Revolution. He has many friends who live there. Mr. A enjoys the simple lifestyle in Shanxi province. Compared to Beijing, there is less pollution, things are cheaper, and there is not much competition. It is much quieter and more relaxing there. “Right now, the happiness level in Beijing is very low; it has become a place where people fight for life, and it is not good for retirement.” Retired older adults expect a more harmonious and relaxed social environment. Ms. D also made a comment on the positive social environment for older adults

It is the government who should be in charge of making a positive environment for older adults by providing more learning

opportunities. Also, there should be platforms for older adults to show their elegant demeanour. If you provide them opportunity to show [their talent], they become motivated and are more likely to be more positive in life.

Ms. D has engaged in volunteer activities for more than ten years, it has become her second career. With her knowledge of Chinese traditional medical treatment, she is able to help others and give them physical comfort. Ms. D said

People belong to the society. You need to walk into the society to communicate with others, which is much better than sitting at home and reading books by yourself. Older adults need to act and get others' recognition. When you do something good for others, others will do things for you in return, which makes life meaningful. Even if they don't do anything right now, you have shown your initiative, kindness and capability to the society which can gradually change society's view on older adults.

All of the participants in my research maintain high levels of social engagement. They all have busy schedules and all of them look healthy, happy and energetic. Even though Ms. D is widowed and Mr. A is divorced, you find no trace of desperation, sadness and depression. They are still able to enjoy life in their own way. The participants either take on productive roles in social groups or in leadership of volunteer activities. They actively taking on new roles to replace the one they have lost as they aged. They are representatives and role models of older adults who will achieve successful aging (Diggs, 2008).

5.1.3 *Learning to live independently*

In Confucius' philosophy, filial piety is a basic virtue and responsibility of individuals. You must respect your parents all the time and take care of them when they become old and are no longer able to feed and take care of themselves. The highest form of filial piety (Li Ji, 28) is to glorify the parents and never fail. One should provide and support the parents with everything, because parents gave life to their children, who should in return be thankful and respect their parents (Xing, 2010). Before the One Child Policy, there were usually five to six children in each

Chinese family. Parents had high expectations for children to support and provide for them when they get old. The tradition has passed down through generations. However, in China today, especially in Beijing, there is a big change in the traditions in terms of fierce competition, the huge cost of daily expenses, and the pressure of employment which children of retired older adults are experiencing. The perspective has changed largely from the parents' side. They look forward to being more independent to avoid bringing trouble and pressure to their children.

Except for Mr. A who is divorced and without children, all of the other three participants expressed their understanding of the younger generation and their wish to be more independent to avoid relying on their children. Ms. B commented

I don't have much expectation from them [my children]. For me, I do my best to exercise and be healthy to avoid causing them trouble. Now most retired older adults have the same idea as I do. We all know that life is not easy for our children. Even though the material supplies are abundant, there is too much pressure mentally. You never know when you will be fired; people are always stressed. Also there is no fair distribution of wealth. You need to work really hard to have a good life.

Ms. C said, "I can take care of myself and my husband and we can help each other. We don't want to bother our children, unless the day comes that we can no longer move and we really need someone around all the time. Then we have to live with our children."

Ms. D has a brief answer: "I have my life and I am healthy. I don't want to disturb my children and I don't want them to disturb me either." All participants have shown that they are strong and confident of being independent rather than trying to rely on their children.

According to Fernandez-Ballesteros et al. (2010), there is consistent agreement across different cultures and countries about the key components of successful aging. They include: absence of chronic and psychological disease, a high level of physical activities, social contact (Depp & Jeste, 2009) and a high level of resilience (Hildon et al., 2009). The comments of my

research participants have shown that there are already some Chinese older adults who are able to correctly interpret the meaning of successful aging, though not well aware of it. They are the pioneers in achieving successful aging themselves. They have demonstrated successful aging by their actions. However, I would like to conduct further analysis to discover what has helped or led them to successful aging.

5.2 Lifelong Learning Programs and Activities

There are always doubts as to what older adults are able to learn and, after learning, what they can do with the knowledge they have acquired. The ageists consider older adults learning as simple entertainment and the learning institutions as places that take care of retired older adults. Actually, there are various reasons that retired older adults participate in lifelong learning. Learning can help older adults adjust to changes in life (Fok, 2010). It answers the coping and expressive needs of older adults (Findsen, 2007). Glanz and Neikrug (1997) consider older adult learning a social investment, as it promotes intellectual and personal development. Learning also brings out self-recognition, contributes to the wellbeing of community (Merriam & Kee, 2014), and helps fight against ageism (Benbow, 2009). Let's take a closer look at how lifelong learning programs and activities can help Chinese older adults with successful aging.

5.2.1 *Learning motivations*

Older adults participate in learning activities for various reasons. Some are looking for recreational activities, some are anticipating more social engagement, and some register in classes for the purposes of acquiring more knowledge. Houle (1961) conducted research in order to study motivation of adult learning. The results showed that there were three types of learning motivations among older adults: the goal-oriented, which means older adults pursue learning in order to “achieve an objective, such as to get a job” (Merriam & Kim, 2004, p. 443); the activity-oriented, which means older adults attend learning activities for social reasons rather than for the

content of learning (they just want to make friends) (Merriam & Kim, 2004); and the learning-oriented, which means that older adults come to class to pursue pure knowledge (Merriam & Kim, 2004). My research participants can fit into different groups bearing in mind that orientation is shifting depend on context not static.

Mr. A is a typical example of a goal-oriented learner. He registered in class in order to introduce the world to others by writing blogs about the places he has been to. With knowledge of the computer and Internet, he can achieve his goal and be interactive with people who have the same hobbies as him, both in person and on the Internet. Writing blogs also helps develop Mr. A's talent in writing, He has never been so sure and happy with himself, with what he is doing, and with life.

Like Mr. A, Ms. B is also a goal-oriented learner. She is in keyboard class because she has a keyboard at home and she wanted to play it well. Her motivation arises from cognitive interest, which appears to be the strongest motive for learning among older adults (Merriam & Kim, 2004).

At first Ms. C could be considered a goal-oriented learner, because she wanted to have better health so she learned to play Taiji. Then when she decided to learn traditional Chinese medicine, it was out of her curiosity and interest in pure knowledge. She became learning-oriented. After that she registered in different classes to learn more skills which could make her retirement life more fun and prepare her for the years of her full dependence on family members.

Ms. D used to be an activity-oriented learner. For the first few years after her retirement, she felt so bored and lonely at home that she decided to enroll in a class. Later, she had no clear ideas regarding her learning interests. She just wanted to be connected with other people and find something to do in her free time. When she started to learn traditional Chinese medicine, she

became learning-oriented in the pursuit of knowledge. Then she became a goal-oriented learner in order to use the knowledge she learned to help older adults in nursing homes.

In summary, we can see from four participants' learning experiences that learning brings changes to a person. While the person changes, their learning motivation changes as well. There is seldom one type of learning motive that stays the same in a person's learning journey. Both internal and external factors influence older adults' decisions in pursuing lifelong learning (Merriam & Kim, 2004).

5.2.2 The programs and activities

The learning of older adults is different from that of younger learners. Their learning pace becomes slower (Palmore, 1998), but learning is still beneficial to older adults. Learning is addictive; the more people learn, the more mental abilities are preserved (Rowe & Kahn, 1998). There is an increasing demand from older adults in China to learn in a formal educational institution, so it is a challenge for professional educators and educational institutions to design learning programs to address and accommodate older adults' learning needs.

We have understood that older adults attend learning programs with different motivations. That is why they want to choose programs that best accommodate their motivation and needs. Some programs support older adults in facilitating social functioning, such as health care and social interactions. In Beijing Open University of Older Adults, such programs include Chinese traditional medical treatment, training to caregivers, and introduction to English literature. These classes have become very popular among students. For example, by taking Chinese traditional medical treatment classes, students acquire knowledge of how to lead a healthy life and learn to treat small health problems. The caregiver class provides older adults opportunities to interact with people who receive care and generate self-worthiness and self-fulfillment by giving something of value to others.

The university also provides programs such as singing, dancing and playing musical instruments. These programs help older adults to explore and cultivate their interests in life and learn new skills. It is also worthwhile for older adults to share “experience and insight of learning with their peers to continue the integration and growth of older adults” (Mehrotra, 2003, p. 648)

Other programs offered by Beijing Open University of Older Adults include handcraft, tourism and photography. These classes are also very popular among students. Some are culture-related. For example, the tourism class introduces scenery and traditions from different cities of China. It gives students a sense of cultural heritage and pride in the country’s natural beauty and resources. Such programs

Provide understanding of the meanings that insightful people of other ages and cultures have attached to life; it offers a supportive and stimulating setting for reminiscence; and it facilitates contemplation and learning to replace the restraints of the body. (Mehrotra, 2003, p.650)

Programs such as computer skills and spoken English can give older adult learners a feeling of ‘can-do’ which greatly increases their confidence and sense of self-fulfillment.

Overall, the programs provided by Beijing Open University of Older Adults are sufficient in answering learning requirements. The classes appear to function well to facilitate successful aging. The top priority of providing these classes is to bring joy to older adults. Jarvis (2004) considered leisure education important, for it enriches older adults’ lives and they have an opportunity to spend leisure time in a creative manner. The programs also assist older adults to explore their capabilities, their worthiness and the meaning of their lives.

5.2.3 *Professional teachers*

There is one more factor that attracts older adults to learning: high quality teaching from professional older adult educators. All teachers delivering older adult classes are professional

teachers retired from universities or have been working with older adults for a long time. They know how to make it easy for older adults to learn. Most of the classes receive very good feedback from the students. However, improvement is still needed, according to students' feedback. I asked my research participants what types of teachers and teaching they prefer in class. In Ms. D's opinion, a good older adult educator should first show love, as well as a lot of patience and solid knowledge.

The elders like to talk and they ask lots of questions. If they [the teachers] don't have love, they will get annoyed easily. They should respect students and treat them as their own parents or friends. Other than that, teachers should be experts in the knowledge they teach and know what is difficult and how to make it easy for older adults to learn. Then, when teaching old people, teachers need to be very patient and able to give clear instructions by showing exactly what they want students to do.

To Mr. A, a good teacher writes down details that are key to the study and slowly lead students practicing the procedures for several times until everyone knows how to do it. Otherwise, students forget what they learned in class and they can't practice at home. Ms. B said that a good teacher does not underestimate older adults' capabilities in understanding and learning new knowledge. Doherty (2012) claimed in the research that adult learners are usually more sophisticated and experienced. A sufficient class for adults should be balanced between lectures and practice. It is better if teachers can guide students by modelling work for a few times in class, because older adults need repetition of what is taught again and again in order for it to become automatic (Bean & Laven, 2003). If there were more trained professional older adult educators available for older adult universities, this would certainly attract older adults to learning activities.

5.3 Contributions of Lifelong Learning to Successful Aging

5.3.1 *Being more confident and in control of life through self-development*

Lifelong learning is a choice that older adults make to fulfill their desires in retirement. For example, some older adults love singing and dancing; however, they did not have the opportunity to develop their hobbies when they were young because they were occupied with work and housework. They finally get time to pursue their interests after retirement. However, people also need a lot of perseverance to do this. As Ms. B mentioned, it is easy to attend a few classes, but to make it last you need perseverance and passion. A meaningful hobby developed in retirement can help older adults adapt to changes in retirement, and through pursuing hobbies, older adults can recognize their capabilities and be more confident. As Ms. C said, “Learning has become a hobby of mine. I can’t do without it.” Learning can help older adults exercise their power and make choices in life (Knowles, 1970). At the same time, learning is a totally personal choice; older adults should realize this to experience the joy brought about by learning. As Mr. A pointed out:

If older adults want to enjoy their life or not, it all depends on themselves. Like me, if I don’t travel or to come to class, I will be an empty-nest old person (someone who has no spouse and children around). If I die at home, nobody knows. Happy life depends on older people’s own choice. It is nobody else’s business.

All older adult learners look for self-development through learning. Ms. B told me

Most [older adults] students who keep going to classes for a long time look forward to learn some real skills or knowledge, first of all, through learning, we make our own life happy, then we still want to improve and get better with the knowledge.

Ms. D commented that both skills and fun are important for older adults. Learning can motivate older adults to engage in further learning activities. This helps with cognitive development (Benbow, 2009)

In fact, if people start to learn, their brains become active. When a person gets old, the brain, hands and legs get old first. If you don't do exercise and you don't use your brain, it ages faster. Some older adults prefer to stay at home and play with cats and dogs. They have fun, too, but it is just not meaningful. I think old people should get both skills and joy in life.

Learning can bring the feeling of strength and confidence to older adults whose sense of mastery and control of the external world is enhanced (Fok, 2010).

However, the question is: Why do older adults choose to learn in a classroom setting? My participants have stressed the significance of going to classes and learning with classmates. Ms. C mentioned the importance of talking with people who have something in common with her:

My classmates are all around 60 and 70. We encourage each other a lot, because when you learn by yourself, nobody can help you, which makes giving up easy. But when I learn in class with others, I am more motivated. If I learn faster than others I feel proud of myself; if I fall behind, I need to catch up. I like to come to class; when we study together, we feel happy. Also, I have been working with older adults for a long time. I enjoy being with them and we have a lot in common. All of my classmates are well educated and have good personalities. I feel comfortable spending time with them.

Ms. B told me that by learning she has the opportunity to share ideas with her classmates. At the same time, she is also influenced and inspired by others' perspectives. "When you communicate with other people, you gradually get influenced by their way of thinking, treating things and people. I feel that I have improved gradually." Older adults need to feel competitive and learning can provide them with a feeling of achievement. By learning with peer groups older adults see themselves differently and they see others in a different way as well. They also acquire more confidence in their capacity to learn (Fok, 2010).

5.3.2 *Expanded horizon by learning.*

Learning keeps older adults updated with the latest information, news, technologies that broaden their horizon, the way they see the world and stay connected to society (Withnall, 2012).

It is the tradition in China that everybody needs to pay respect and take care of elders in society, even though they are not your own parents. Children need to support their parents and live with them to take care of them when the parents get old. Parents can indoctrinate their children whenever they want and children can't go against parents' will. However, in the modern world young people have become more independent and have their own way of doing things. Parents can no longer indoctrinate their children. Instead, they need to settle down and live together with the younger generation in society. Learning has helped older adults established understanding and a positive outlook (Weinstein, 2004). Ms. D said

I am 70 already. I think the day that I need my children to take care of me is coming closer. When that time comes, I will have to live with my children. There is a problem, which is that old people like to talk a lot and nag their children with their own ideas, which young people hate. One of the reasons why I go to musical instrument class and knitting class is that I can spend my time doing handcraft or practice a musical instrument in my own space. I can still enjoy myself without annoying others, so that my children and I can live together in peace.

In view of the fierce competition in the modern world, more and more older adults have come to understand the pressures their children encounter. Older adults try to help their children and they have shown great devotion and tolerance to the younger generation. During the interview, we talked about whether young people should give their seats to older adults on public transportation. Giving seats to people who are in need, especially to older adults, is considered a very good Chinese tradition in showing respect to elders. However, today not many young people are willing to give up their seats, especially during rush hour. Surprisingly, all my participants showed understanding and tolerance for this behaviour. All of them said that they don't need young people to give seats to them on public transportation because they are capable of standing up for a while. They all mentioned that they think young people are more tired, especially after a long day's work. Although Mr. A is over 60, he still looks energetic, with only

a few grey hairs. It is hard for people to tell his real age. He joked with me and said, “I am very unlucky. There is nobody that has ever given their seats to me. Instead, I give my seat to others all the time.”

Older adults in China show their tolerance and consideration for the younger generation by being independent and breaking the traditional moral pattern of filial piety. Now there are more and more retired older adults who prefer to take care of themselves; they don't live with their children. When they reach the physical condition where there must be someone to take care of them, they are willing to go to nursing homes instead of staying at home. Still, there is a lot of criticism of the younger generation who send older adults to nursing homes. Actually, nowadays a lot of nursing homes take care of older adults in a more scientific and healthier way. In some people's minds, nursing home is like prison. Elders who live there are treated like prisoners. Ms. D strongly suggested that people should remove their prejudice about nursing homes:

Nursing homes provide better care to old people, because nowadays ‘Social endowment, Cultural and Humanity endowment, and Scientific endowment are advocated in nursing homes, which means that old people should still be considered members of society. Besides physical health, they also need to achieve spiritual satisfaction through group activities. They should as well enjoy the love of family members, and they are taken care of in a scientific way. There are different levels of care according to the health condition of older adults. They can join different activities and make friends in nursing homes. Besides, their family members come to visit frequently. Older adults can enjoy their late life there. I think people should look at nursing homes from a different perspective.

In modern society, older adults have become more independent. They try not to cause any trouble for their children. Especially the ones who continue to learn are healthy and busy. They have their own life and friends. These older adults are not a burden to the younger generation; instead, they can even help to remove burdens from their families.

5.3.3 *Recognition of self-value and contribution*

Older adults are usually considered non-contributors to society and they depend heavily on social benefits and drain wealth and energy from their family and society (Merriam & Kee, 2014). However, this is not the correct image of older adults. Adult education can promote “social justice and democratic ideals” (Findsen, 2007, p. 548). Lifelong learning can satisfy older adults’ contributive need. A lot of older adults still “seek to repay the society” (Findsen, 2007, p. 551). However, their contributions are often not recognized. All my research participants have mentioned that most retired older adults spend lots of time taking care of their grandchildren. For older adults who can come to class regularly, either their grandchildren are in middle school or they don’t have grandchildren yet. I asked my participants how people can identify older adults’ contributions to society. They told me that people need to look at what takes up most of older adults’ time and then decide their contribution.

In the old days in China, the whole family used to live together; the largest family included four generations. It is the tradition that parents help take care of their grandchildren. It is usually the women’s responsibility to take care of children at home because they don’t work. Today, women have the freedom to work. Their roles are not restricted to the family setting. In modern society, competition is everywhere. People get paid according to what they contribute. In order to live a good life, every family member needs to go to work. Women who have jobs are, by law, only entitled to 90 days of maternity leave. Then they have to return to the workplace. But the child is still very young, so the parents need someone they can trust to take care of the child full time. The best choice is to ask their retired parents to come live with them and take care of the child.

There are some families that hire nannies because the elders in the family are deceased, not in good health, or not yet retired. In China today, the most expensive service is providing a

nanny either for children or older people. A professional nanny earns 6,000 to 12,000 yuan per month, which is considered high income; some experienced nannies may get more. The family also needs to provide free accommodation. In 2013, the average income per person was 5,453 yuan in Beijing; the income for a family is around 12,000. However, the cost of living in Beijing is high and getting higher. The total of apartment rent or a mortgage, transportation, grocery and other necessary expenses can reach half of the family's income. In this case, if the family wants to have a child, they definitely can't afford a nanny. If the grandparents can help take care of the baby, the family is considered lucky. In Ms. C's opinion "If people look at older adults' value in an economic way, we can say a family can save about 10,000 yuan per month when retired parents taking care of the newborn, and usually the retired parents are quite willing to take on the task."

Ms. B told me

There are three people in my daughter's family. With their income they can't afford to hire a nanny. The expense will be a whole month's salary. Nannies are really expensive nowadays in Beijing. With the rest of the salary, they can barely support the whole family. So I went to help my daughter until my granddaughter went to primary school. Now I still need to pick her up every day after school, because school finishes at about 3pm and my daughter and her husband would still be at work. People who go to pick up the children are usually the grandparents.

From what the participants pointed out, we notice that retired older adults have made great contributions to families, which can be translated into great economic value to the family and society. If the younger generation is not able to concentrate at work, there will be less technological and economic development and the economy will grow more slowly. If every citizen were worried about their family, chaos would break out. Just as Mr. A said, "For a country, properly settling older adults means stability and unity". Older adults are not as stupid as the bias suggests. Most of them are very rational and reasonable in looking at and judging

situations. They are an important part of an organized and harmonious society. Their contributions to society cannot be ignored. Sometimes, even when they decide to retire, they are actually making a sacrifice. Mr. A noted that

Some people say retired older adults make no contribution to society anymore. Actually, we are capable and still willing to work. However, in China you have to consider the bigger picture. There are too many people. We have to give opportunities to the younger generation. Personally, I feel I can work till 70.

Besides the sacrifice they made and the contributions they brought to families, some older adults also actively participate in activities that concern the development of their cities, helping people around them and becoming positive role models, as well as spreading and enhancing knowledge of Chinese culture to the world.

5.4 Active citizenship

The concept of active citizenship is slightly different in different societies and cultures, but there is always something in common. The European Commission - Education and Training defined active citizenship as “have required capacity to face with new issues in a modern era, plus an awareness of common norms and identity towards social and cultural interplanetary” (Ahrari et al., 2014, p. 2450). According to Clarke and Missingham (2009), there are four dimensions of active citizenship: how people act based on their rights, connections, challenges and context. The active citizen usually has a high level of involvement in community activities. They have lots of friends and are good at networking, are willing to show their capabilities and influence, and are able to adjust their way of doing things according to the context.

Jarvis (2007) claimed that learning can promote social change. With new technology, retired older adults are able to know more about what’s happening in the country and in the world. They are able to make their own voice heard through networks. They actively look for resources to contribute, considering their own abilities. It is well known in China that people

who were born in Beijing like to talk about politics and follow political issues and topics closely. Some retired older adults keep seeking opportunities to participate in volunteer activities, whether in the community or at big social events. Recently, research shows that volunteer work has become one of the favourite learning activities for older adults. This volunteerism significantly meets their need to contribute and influence others. “The development of volunteering opportunities for older people is likely to be a useful approach in reaching and meeting the needs of a range of older people, particularly those most vulnerable and isolated” (Aldridge & Dutton, 2009, p. 7). Older adults who volunteer must be expert or strong in a certain skill or knowledge. While they help others to learn, their own knowledge is also strengthened. It is of mutual benefit for older adults. Helping others and getting involved in social activities encourages older adults to develop a positive mentality about their existence. Meanwhile, they help create a closer and better community. Gradually, older adults acquire a feeling of control over their lives. Their physical and mental abilities are significantly improved. They feel that they can contribute more and, though unintentional, their positive attitude influences the world around them (Aldridge & Dutton, 2009). As a result, older adults are more empowered and they feel that they have found the meaning of their existence. Moreover, volunteer programs help remove bias toward older adults and help the public to realize that older adults are still contributors when they actively engage in informal and non-formal learning as a catalyst for informed citizenry and social agency (Findsen, 2012).

Among my research participants, Ms. D is a very popular person among volunteers in Beijing. She has been doing volunteer work for 14 years now and has been interviewed by 15 members of the media. Ms. D never experienced love from her mom, who died giving birth to her, but she has received a lot of love from people around her. After Ms. D grew up, she had a

wish to become a teacher or a doctor in order to repay society for the love she had received. She has taken it as her responsibility to contribute. Now all her wishes have come true. Teaching became her profession. After she retired, she went to learn Chinese traditional medical treatment and now she can be called a doctor, helping people by relieving their physical pain.

She also has a wide network of friends who are retired and willing to join her in volunteering and who can provide her with opportunities to visit new nursing homes or who are willing to perform in order to bring something fun when they visit nursing homes. Ms. D treats older adults in nursing homes as her own parents. She feels a happy sense of self-achievement by volunteering. She looks at least 10 years younger than her actual age. The volunteer activities that she participates in are usually a double-edged sword. These activities show that older adults care about and can help others, in the meanwhile, the society also takes care of older adults.

Last year, Ms. D took some retired older adults together with students from Tsinghua University to a nursing home. It was the Double-Ninth Festival that day, which is a Chinese traditional festival for older adults. 'Double-Nine' means longevity in China. They plan to celebrate the festival together in the nursing home. Coincidentally, it happened to be one volunteer's birthday, so all the other volunteers and residents in the nursing home celebrated the birthday of this volunteer. According to Ms. D

It was very meaningful. This activity had double meanings. It showed that students from Tsinghua University did not only come to visit seniors in the nursing home. They also care about volunteers who are seniors as well. The activity has a really good influence and social effect.

Ms. D has also arranged activities such as arranging for volunteers to go to classrooms to relate their life experiences to students:

I know a retired man who was a soldier during the China-Korea War. I asked him to tell his experiences of the war to middle school students. Students were very interested and they loved to

listen to such stories. Students' historical knowledge can be increased, as well as their love for their country.

Ms. D believes that older adults have the urge to show their talents:

They [retired older adults] still have energy and are capable of helping others. But the point is that you need to walk out of your home and participate in activities in the community so that people know what you can contribute.

Retired older adults have abundant life experience. They have been through historical events and they can help pass down the lessons learned and the essence of historical events to the younger generation. Young people have the urge to learn what happened in the past and it is good that they can experience the past and become proud of the country without making the same mistakes again.

At the same time, retired older adults also help carry forward the traditional Chinese culture. Throughout history there are some Chinese traditions, cultural knowledge and sciences which are good and should be inherited, which can be carried forward only by people who experienced them and understand them. Respecting elders is one of the good moral traditions in China, but due to competition and the attitude of respecting only wealth in China, people seem to have forgotten how to respect elders. During my interview with Ms. B, she mentioned that

Nowadays the social conduct has changed a lot. People only act enthusiastic and kind to us when they want us to spend our money. Some bad people even cheat older adults out of their money by selling fake health products, because they know that elders want to have good health and live longer. Also, older adults like to save money instead of spending, so when we go to shopping malls the sales person won't even look at us.

Even though the economy is developing fast, morality is gradually declining in China. The government needs to improve moral education for children. As Ms. B said, "Parents need to be role models for their children. If parents don't even respect older people, how you can expect a good influence on their children?"

Today Chinese traditional medical treatment has become popular again. More and more Chinese people realize that treatment by Chinese ways is more suitable for removing the disease thoroughly. Unlike western medical treatment, Chinese medical treatment doesn't encourage removing organs or body parts. They are preserved by drinking medicine made from plants in nature. The concept of Chinese medical treatment is to adjust inner body balance and it aims at nutrition of the body to achieve a healthy and longer life. It is generally considered less harmful to the body and more efficient. Among my research participants, two of them have learned Chinese traditional medical treatment. Both of them are able to give treatment to people, especially Ms. D, who actively volunteered in different nursing homes with her knowledge of Chinese medicine and gave free treatment to the public. She has been a great influence. Ms. D is well known for her devotion to people who are in need. At the same time, she encourages more and more people to understand and get interested in the benefits of Chinese medical treatment. She helps strengthen the knowledge of Chinese medical treatment, enhance the essence of Chinese culture, and spread love to others.

From the above we can see that learning can definitely encourage active citizenship. Older adults become more confident when they receive respect and recognition. As a result, they become more independent and willing to show that they are capable of contributing to society. Their actions are stronger than words in fighting against bias from the public. That is why we say lifelong learning can facilitate successful aging and encourage active citizenship, as well as creating harmony and stability in a country.

Chapter Six: Discussion and Conclusion

6.1 Features of Chinese Perspectives on Successful Aging

In the age of “aging,” countries aim to properly settle their elder citizens and make sure they have a healthy, happy and secure life. Successful aging, also known as “healthy aging” or “positive aging” (Dillaway & Byrnes, 2009), has become the goal set by governments for their elder citizens to achieve for their own good. The concept can be defined from biomedical and psychosocial perspectives (Bowling, 2007), which generally include physical and mental health, cognitive efficiency, adaptation and competency (Hilton et al., 2012). Although the factors are considered realistic and are tested by researchers, this definition is not sufficient to represent the perspectives of elders from different cultures (Sadler & Biggs, 2006). In this research, I focus on Chinese retired older adults, whose perspectives on successful aging are definitely influenced by the Chinese culture. In the following, I will examine some typical features in the opinions of Chinese retired older adults, which are usually not included in the academic models of successful aging (Hilton et al., 2012).

First, longevity has been and still is perceived as very important by every Chinese person, especially the elders, ever since the Qin Dynasty (B.C 221- B.C 207). From Emperors to ordinary people, they all actively seek ways to live longer. People in their third age have abundant life experiences. They have come to know themselves better and have a good understanding of what is important in life. With all the transformations they have gone through, older adults appreciate the time that is left for them and they would prefer to live a quality life as long as they can. In China, people have the belief that the longer you live, the happier you should be. Although it might not be the case for everyone, the truth is that everybody prefers to live longer, so this desire has been inherited and has been rooted in the Chinese people’s belief.

Basically, almost every older adult in China takes physical health and maintaining vitality as fundamental positive features in aging (Gale, 2012).

However, according to Duan (2013), the meaning of being healthy includes four parts: absence of illness, living independently, psychological happiness and an active lifestyle. Absence of illness is the basic factor for obtaining a quality life. Older adults who exercise frequently and regularly will have a lower risk of getting a disease and they will have a higher level of satisfaction in life (Li, 2005). Satisfaction in life and a stable psychological condition contribute to a quality life. With good physical condition, older adults are able to take care of themselves, going out with friends and being involved in various social activities. In this case, they feel happy and independent, which contributes to life satisfaction. Their life quality improves as well. That is the main reason why Chinese older adults pay a lot of attention to physical exercise and recreational activities.

In addition to health, financial welfare for older adults counts as another urgent issue worldwide (Antonucci et al., 2002). Financial security is the second most important factor in retirement; it can affect the level of life satisfaction. Worldwide, most retired older adults live off their retirement savings, usually pensions (Brossoie, 2004). It is the same for retired Chinese older adults. According to the National Office on Aging (2014), the main income for 90% of retired older adults in China is retirement pensions. Their average monthly income is 2532.8 Yuan nationally; in Beijing the monthly income for older adults is 2,983 Yuan. Only 70% of older adults feel the income is sufficient to cover their daily expenses. However, compared to their counterparts in other countries, Asians live better because of their collective lifestyle (Brossoie, 2004).

Chinese older adults are well-known for their intention of accumulating wealth. They usually try hard to save after retirement. Most older adults will save for medical care, which is expensive. Although some of them are covered by medical insurance, which can cover part of the expenses, they still worry that if a big operation is needed which requires a large sum of money they might have to pay for it themselves up front and then have part of it reimbursed. Therefore, most retired elders will first save for future medical expenses and then, if they have extra money, plan to invest in something at a reasonable and affordable price. Beijing is considered one of the top three richest cities in China. Retired older adults enjoy better welfare payments than their counterparts living in other cities. Not all older adults in Beijing are feeling financially secured, let alone older adults in other cities. Financial security is important for improving life quality in retirement, because older adults' capability to pay for their medical expenses is one factor that contributes to their life quality (Xu, 2010).

In western cultures an individual is considered the smallest unit of society. However, in China, from Confucius' point of view, an individual is considered incomplete by him/herself. He or she will only be complete when he or she starts a family, which is considered the smallest unit of society in China, and all family members should live together all the time. In Chinese culture, there is strength in numbers. The individual should always think and do good things for the benefit of others. In the modern world, although family ties are not as close as before, most Chinese older adults still expect their children will take care of them in their last years of life. Filial piety and social responsibility of the younger generation toward their parents is still considered a good virtue. However, due to competition and busy work schedules, the younger generation spend less and less time visiting their parents and caring about their feelings and their life. More retired elders feel a lack of caring on the part of their children, the feeling can cause

health problem such as depression. As a country with strong filial piety tradition, the younger generation needs to pay attention to give as much as caring they can to their parents to assist them with healthy aging.

Retired older adults need more compassion today than before. They need to feel respected, recognized for their experience and their social value. Emotional compensation to elders usually refers to caring feelings from family members, so that elders can enjoy filial happiness. It is hard for adult children to spend time with their parents because they have such busy schedules at work and with their own families. The best time for them to visit is on the weekend. However, if children and their parents do not live in the same city, the children might visit their parents once a year or even less frequently. Another perspective regarding elders' feelings is from the standpoint of success of the off-spring. All Chinese parents have high expectations for their children. They want their children to have a good life and the success of the children can bring joy to elders' lives as well (Li & Tong, 2007). The wellness of family members is another factor that influences successful aging for Chinese older adults. In a family-oriented society such as China, the close and caring relationship between parents and children, the success of off-spring, and the wellness of family members are three factors that have great impact on an older adult's life quality. When considering successful aging in China, we must take these three points into consideration.

In addition to the above three factors involved in successful aging, during the interview sessions all my research participants mentioned that older adults do not want to bring trouble or cause problems for their children or other family members. This can be considered as a different type of independence. As a people who possess a collective thinking rather than individualist thinking, Chinese older adults focus more on others (Iwamasa & Iwasaki, 2011) than on

themselves. Not causing trouble or becoming a burden to others is another source of happiness to older adults in China.

Finally, since Chinese people possess this collective worldview they prefer to act in groups rather than individually. Social connections appear to be very important to Chinese older adults. Chinese older adults can have more fun going out with friends than doing things by themselves. Nowadays the square dance has become popular in China and it is even performed outside of China. Most of the people who join this type of dance are retired older adults. Through dancing, their passion and talents are easily released and displayed. In fact, Ms. Shang, Director of Geriatrics at Beijing Hui Long Guan Hospital claimed (Aug, 2014) that square dancing is a platform for older adults to socialize, which shows that the elders feel lonely and need the company of others. A public socializing platform is a good compensation for retired older adults. The society needs to provide older adults more opportunities to meet new people and make friends in various activities.

To summarize, the responsibility for successful aging should not be placed on retired older adults only. As a marginalized group, older adults' opportunities are limited by structural inequalities (James et al., 2010). Instead, the government and the whole society should all be responsible. First of all, as we noticed through research, most Chinese older adults are not aware of the term successful aging, which means that the government needs to spread the idea of older adult education and its positive effects to public. Increased publication of the benefits of learning to the public and especially to older adults is needed. Trying to make learning opportunities more available and reachable for older adults has become a top priority in Beijing.

6.2 Provision for Older Adult Learning

Today the whole world is working to build a social system to accommodate the growing numbers of older adults. Being aware of the benefits of learning to older adults, the Chinese

government has started to invest in facilities and teaching resources for older adult education. Many learning institutions for older adults have been set up, including classes in the regular universities and community centres. In China, there are more than 40 thousand learning institutions for older adults, with more than 4.3 million students enrolled (Xiao, 2012). Older adult universities have received a warm welcome in China. There are usually more older adults waiting to be registered than the universities could accommodate, so every year one can see older adults queuing outside universities in the early morning hoping to register in classes. There is also another phenomenon regarding university students: some students in university postpone their graduation because they don't want to leave university. There are students who stay in university for 24 years and still don't want to graduate (Ban Yuetan, 2014), which is another reason why it is difficult for new students to register. Some older adults register themselves in many classes because they are interested in a variety of subjects. In order to let everyone enjoy learning opportunities, universities have to set a limit that students are only allowed to register in two classes. However, it is still hard to enroll in classes, as there are too many people on the waiting list.

The fact is that the number of older adults is growing at a rate of 3% annually. In 2015 there will be 221 million older adults in China. In order to satisfy older adults' learning needs, the Chinese government has made great effort to set up learning institutions within reach of each community, so that it is convenient for older adults to fulfill their learning needs. In the meantime, educational organizations try to improve programs provided to older adults, since the existing programs are mainly recreational. Those retired older adults who have a passion for a specific skill and who had been an expert before retirement might still want to improve their skills by taking further study in the field. Regarding this, the educational institutions might

enhance cooperation with local universities by inviting professors to teach older adults. At the same time, experience-sharing sessions could be organized among older adults, university students and professors. Older adults have a lot of practical experience in applying skills in daily work. Sharing experiences can provide students with the opportunity to understand how to apply knowledge in the real world. Professors might be able to improve the way they teach, so that students can become more adapted to the way knowledge is used at work. The most important factor is that during experience-sharing older adults acquire new knowledge, as well as being recognized for contributing useful information to others, which helps them become more confident and aware of their value. For older persons who are still young enough and would like to seek reemployment in the near future, such learning can help increase their competency for a new job.

As the cultural and political centre of China, Beijing is taking the lead in advocating older adult education to the public. Beijing is well-known for having the best education institutions and teaching resources in China. With a comparatively high standard of living and a modern lifestyle, people are more open minded to new concepts and perspectives on life. They are more likely to welcome new ideas and seek new experiences. We will consider the situation of older adult education in Beijing. By 2013, there were 18 registered older adult universities and 15,720 registered students. The average cost is 180 to 400 Yuan per class for one semester. For retired older adults living in Beijing, this learning expense is low, considering that they receive several thousand in retirement pension every month. So for those who intend to continue learning, money is not a concern. However, the problem is that there are insufficient number of older adult universities in Beijing, which all of my research participants have complained about. What's more, existing learning institutions are hard to reach. They are geographically far away

from certain communities. For example, three of my participants have to spend one and a half to two hours on public transportation travelling to the university. Mr. A lives closest to the university, but he still spends 40 minutes each way.

Analysis reveals that in Beijing only 6 out of 1000 older adults have the opportunity to study in older adult universities (Beijing Daily, 2013). My research participants commented on some insufficiencies of provision for older adults learning. Ms. B said: “I think the most urgent problem to be solved is that there are not many schools for retired older adults. If there were schools close to the communities, I would not have to travel all the way to the school far from my place.”

“There are not many [institutions]. When I organized activities, I found it difficult to find classrooms and teachers. Something needs to be done to let the public know the importance of older adult education and older adults’ needs,” said Ms. C.

Another obstacle is that even if there is a learning institution in the community, older adults might not be aware of it due to lack of publicity. Often, there might be a learning institution in the community, either in the form of community centre classrooms or borrowed classrooms in nearby middle schools, but if there is not enough publicity about the school, the classes they provide, and the teaching resources, people will not notice the opportunities around them, because news only spreads when people notice and talk about it to each other. As Ms. C commented, “I’m not familiar with the facilities in Feng Tai District [where I live now]. I lived in Hai Dian District for 20 years. I am more familiar with this district and I feel more comfortable coming here.” When I asked Mr. A if he found it difficult to find a school that provides classes for older adults, he told me, “It took me a long time looking for universities who

provide classes for older adults. Then I found this one at an exhibition. This one [Beijing Open University for Older Adult] is the best known. That's why I came here to study".

Older adult universities in Beijing are facing big challenges. Large numbers of older adults complain that "there are too many people in one class," "locations of the universities are too far from home," and "it is difficult to enrol in class." The main reasons for the complaints are: first, there are too many retired older adults in Beijing, exceeding the capacity of existing older adult universities. Second, although enrolling in classes is not free, the charge is really low. Most older adults who had received a good education and had a decent job before retirement can afford it. Their monthly retirement income could reach 4000 to 8000 yuan which is a lot higher than the average retirement income of 3000 yuan per month in Beijing according to research conducted in 2014 (China Business News, 2014, January). Considering the number of well-educated older adults in Beijing, the competition to enroll is fierce. Third, most of the older adult universities in Beijing, especially community learning institutions, are not sponsored by the government, so the facilities and size of the institution are quite limited. Some community learning centres only have 2 or 3 classrooms. They cannot satisfy the requirements of local elders.

Another issue worth mentioning is the provision for high quality teachers. Teaching resources for older adults are quite varied in Beijing. There are three different types of older adult universities in Beijing, because their sponsors are quite different. The first type is sponsored by government agencies. Such universities only enroll students who are retired government officials and their family members. Learning facilities in such universities are usually very advanced, with high-tech equipment. Teachers in these universities are professors who have years of teaching experience. The second type of university is sponsored by regular

universities in Beijing. They usually hold classes using existing facilities and teachers are employed from outside of the university, so most of the teachers of older adults work part-time. A third type of university is sponsored by communities or a local district office. They usually cannot afford to have large scale classroom settings and facilities. The teachers they provide are part time and may not come to teach regularly, which means that the quality of teaching is hard to guarantee (Zhang, 2011).

One last thing that may affect older adult university enrolment is the reputation of universities. For example, Hai Dian District is considered the best for provision of educational opportunities. There are many famous universities and middle schools in the district, which is why people thinking about continuing education always consider coming to this district first. But there must be good institutions providing older adult learning opportunities in other districts as well. People need to throw away their biases so that they can take advantage of more opportunities to learn closer to home. It is also the learning institutions' obligation to publicize their organizations, specialties in teaching, and their specific programs, so that they can attract more students. If nobody is going to use the existing facilities or the facilities are not fully used, it is a waste of resources.

In summary, provisions for older adult education are not sufficient in Beijing. There needs to be more schools with good facilities in the communities. More sponsorship is required by enterprises and support by government and regular educational institutions would be appreciated. More full-time older adult educators are urgently needed, and training should be provided so that teachers are well aware of how older adults prefer to be taught and what knowledge and skills they need in life. Additionally, publicizing the importance of older adult learning and of existing available learning resources needs to be improved.

6.3 Emphasizing Lifelong Learning among Chinese Older Adults

Through our review of lifelong education, it is evident that there are multiple benefits for older adults, including better health, social change, and active citizenship (Van der Veen & Preece, 2005; Jarvis, 2006). Lifelong education is considered an “enduring resource” (Leung & Liu, 2011, p. 968) for achieving successful aging. The outcome of learning can enhance learners’ quality of life and self-sufficiency (Leung & Liu, 2011), which is the goal of successful aging. China has a long history of lifelong learning which is interpreted in Chinese as “live and learn.” Learning is inherent and is considered part of living (Jarvis, 2006). However, people seem to forget this basic human intrinsic motivation in the modern world (Zhang, 2008). They only participate in learning as a tool to earn a living and get financial rewards. Even some older adults don’t understand why they need to keep learning.

Rosenthal (2008) claimed that the main purpose for older adults’ participation in learning is to maintain connection with the fast developing world. However, in the modern world, Chinese older adults are not used to learning after regular school age. For most of them, retirement means staying at home, relaxing, and doing some fun activities with friends or concentrating on their hobbies at home. Few of them consider taking a university class and learning new skills with others. Older adult education is still new to them. The exam-oriented education system in China has left people with a wrong idea about learning. Some older adults commented that they are not going to compete to be a “Zhuang Yuan” (the first place and the best in the ancient imperial examinations), so there is no need for them to attend a class.

Regarding the above situation, we can conclude that if older adult education is to take a deeper root in China, the very first thing to do is to let people know why older adults need to keep learning. Detailed explanation of the benefits of learning for older adults has been provided in the previous chapters. Learning is the best way of helping people experience work and life

transitions (American Council on Education, 2008). Learning can solve a lot of problems in older adults' lives as long as the appropriate programs are designed and delivered, such as classes on how to manage financial investments and maintain a healthy lifestyle. Learning also changes the way learners perceive themselves. Without considering their age, they see themselves as lifelong learners. So the programs which target people in the third age are more appealing than programs targeting senior citizens or older adults (American Council on Education, 2008).

Furthermore, in order to attract older adults to learning, the programs need to be improved by considering how to help older adults solve real-time problems in life. Programs need to be practical and require deep thought to make them challenging enough for older adults. The main theme is to combine life, fun and reflection into the program, so that students benefit more from the programs. As a result, older adults could become more interested in engaging in a program which could help them achieve a better quality life, thus making it easier to fulfill the need for successful aging. Let us consider a detailed explanation of programs that are welcomed.

First of all, since the aging population is growing fast, confusion and fear of aging will increase. Society will "make new demands on people in later life, altering established roles and perceptions surrounding what it means to grow old" (Gale, 2012, p. 51). It is an obligation of the government and related institutions to help reveal the true meaning of aging, so that people will not panic about becoming old. Details need to be provided about physical and psychological changes that will occur, especially in retirement. People also need to be aware of the advantages of aging, the value of skills and experiences older adults possess, and what they can do with all their experience and skills. Older adults in China need to divert their energy to what can be done with their remaining life instead of focusing on the life already lived (Carstensen, 2011).

Second, since financial security is a big concern for older adults, programs focusing on how to properly manage family wealth and properties could be introduced, as well as introducing some safe small investment opportunities to older adults, so that they can make a little more money in retirement and feel more secure, self-content and independent.

Third, in view of the filial piety tradition, a program on building intergeneration relationships is necessary, so that communication and understanding become easier between older adults and the younger generation. It would be best that both parents and children attend a session together, so that both could learn something new about each other. This could also help to reduce the fear children have of elders and make it easier for the children to accept their own aging, reducing the chances of depression and isolation of the elders (Spence & Radunovich, 2013). Such programs could help maintain a healthy family relationship, which is the foundation of a harmonious and happy society.

Older adults still possess the energy and “the desire to make a difference, since the older generation has broad knowledge of the practical matters of life and a feeling for social responsibility” (Carstensen 2011, p. 112). They have a great sense of social and moral responsibilities (Gale, 2012). We just need to design appropriate activities to make use of their strengths. These ideas are a double-edge sword which can help fulfil older adults’ need to contribution while showcasing their capabilities as well as creating an active citizenship, which, in the meantime, can help to fight against the ageism.

6.4 Contribution

This research aims to explore the role of lifelong learning in facilitating successful aging in China. However, there is not much research about lifelong learning and productive aging, especially in contemporary mainland China. Literature focusing on older adults volunteerism and active citizenship is also rare (Li, 2012). Most of the literature cited in this research originates

with western researchers under a western cultural background. There are similarities, but there is still a lack of validity with respect to the specific situation in China. The contributions of this research are as follows.

First of all, it is culture specific. Through research participants' narration of their life stories, the history of China's development is presented. Readers will have a clear idea of China's population problem and its impact on the economy, including the One Child policy's impact on population growth and aging. Historical events such as the Cultural Revolution's disastrous impact on China's education system were also discussed in the stories told. All the research participants experienced the Cultural Revolution, which makes them appreciate learning opportunities more than others in a more peaceful time. The research also explains why development of lifelong learning in China is behind that in western countries, which is due to education breakdown during the Cultural Revolution, years of economic reformation, over-population and lack of support from both government and related organizations.

Second, this research has revealed the similarities between the Confucian concept of lifelong learning and the lifelong learning concept of the western world, as well as discussing how Chinese older adults pursue lifelong learning following the Confucian tradition. Both perspectives advocate that learning is lifelong and a continuous process, providing skills and knowledge needed in different life stages. At the same time, both assert that learning is not only restricted to classroom settings. Confucius taught while travelling among different countries in ancient China. His students followed him and learned from him during these travels, and such learning involved the social background and 'walk the talk.' Both western and Confucian concepts suggest that the purpose of learning is the close connection between individuals and society. Additionally, both Confucian tradition and western lifelong learning philosophy

advocate variety in learning content. Confucius believed that individuals cannot live like a container (Jun zi bu qi 君子不器), which can only take in one skill all through life; people should obtain multiple skills and knowledge continuously, according to necessities for living well in society.

Third, the research showed that what Chinese older adults' perspectives of lifelong learning are closely connected with Chinese culture and traditions. Although today older adults in big cities in China are more open-minded than before, most of them still prefer to live with their own children in their final years of life, which is considered the children's obligation in the filial piety tradition. However, they realize the differences between the younger generation and themselves. They learn to avoid conflict in the future. Ms. C is a perfect example of these older adults. She learned skills in order to enjoy her life and spend time with herself, which could definitely make her life less conflictive when she has to live with her children. Besides, not causing trouble to others is also considered a good virtue in most Asian countries. Learning can make a person more independent and physically and mentally healthier. Older adults want to keep their vitality for their own sake as well as for the benefit of others, so that they don't need to bother others to take care of them both at home and in public. One more consideration is that family is considered the smallest social element by most Chinese people. Older adults after retirement are especially mostly family oriented. Their contributions to families are considered the biggest contribution to society. Some older adults learn cooking and care giving in order to take better care of their families.

Fourth, the research has supported the existing literature regarding lifelong learning's facilitation of successful aging. From the research participants' point of view, learning contributes to physical and mental health, improved cognitive recognition, and social

connections. The programs offered have met older adults' learning needs, including their coping needs, expressive needs, contribution needs, influential needs and transcendence needs (Mehrotra, 2003). Learning has also promoted personal growth, such as increased confidence and independence, recognition of self-worthiness, activeness in serving and helping others and having a good influence on and reputation in society. All of the above can bring joy to Chinese older adults and facilitate successful aging.

Fifth, through narration and feedback from the research participants, the weaknesses in the planning and implementation of lifelong learning programs in China are identified. These include deficiencies in economic support, learning resources and professional teaching. Also, more well-designed programs are needed. These programs should focus on stimulating responsibilities to the society as citizens, so that meaningful changes are effected. Besides, the programs should also provoke researching deeper meaning of life and able to make learners see life as a movement beyond physical decline (Erickson, 1982).

Finally, this research has contributed to the need for sufficient literature on Chinese older adults' volunteerism, motives, and influence, as most literature focuses on young volunteers, especially college students (Li, 2012).

6.5 Limitations

There are some limitation to this research. First of all, the participants had good jobs before retirement, which guaranteed their financial stability and security after retirement. Several hundred Yuan in learning expenses would not affect their daily life, unlike some other older adults, who might have been laid off or receive less retirement pension. In such circumstances, these older adults' financial situation might be very insecure, which is a factor that might prevent them from learning.

Second, all participants have strong education backgrounds, three of whom have university degrees. One did not go to university for political reasons. Fisher (1986) claimed that there was a robust relationship between education background and education participation among older adults. Learning by those who did not receive much education in their teenage years cannot be determined from this research.

Third, the research was carried out in Beijing, so it only describes lifelong learning situations in one city. The findings can only present the perceptions of people who live in Beijing as to how they view quality of life and successful aging. The situation might vary greatly due to different economic development, infrastructure investment and lifestyle in different cities, as well as how people perceive successful aging.

Fourth, there was only one male participant in my research. His opinion might not be sufficient to represent all male lifelong learners' purposes for continue learning. Compared to female students, there are fewer male students in Beijing Open University of Older Adults. Men are considered less motivated to learn after retirement because they have family and work as their main interests (Williamson, 2000). Why they choose to be lifelong learners and what they prefer to learn is still needs to be studied.

Volunteering is important to more people in Beijing; both young people and older adults are involved in volunteer activities. Findsen (2012) pointed out that older adults volunteerism can challenge the prevalent belief that they are only the receivers of welfare and consumers of the public purse. In this research, we only discussed older adults' volunteer work in nursing homes. However, they also volunteer for many other events and activities. A more holistic view of older adult volunteerism needs to be researched.

6.6 Recommendation for Future Study

China is a big country with a huge population. The number of seniors over 60 has surpassed 200 million, which accounts for 14.9% of the population. Investment in lifelong learning is still far behind developed countries in the west. Older adults should be made aware of the importance of learning in retirement and the infrastructure for delivering learning programs must be improved. More research is needed to explore how lifelong learning facilitates successful aging for Chinese older adults.

The following suggestions should be considered for further study. First of all, there should be research on how financial status in retirement can affect participation in learning. Second, reasons for participation and non-participation of both genders should be examined. Third, more study should be done as to how education background influences decisions on participation in learning programs. Fourth, within the Chinese culture background, what influence the reputation, facilities and teaching resources of an organization has on older adults' choice of participation should be studied. Fifth, more research is needed to decide which programs can best benefit retired older adults and how these programs should be delivered to accommodate different learning patterns among older adults. Sixth, research focusing on spiritual learning is encouraged, since Chinese people are very spiritual in terms of the culture and tradition. How spiritual study can help to achieve successful aging needs to be examined. Seventh, older adults in poor health or having mobility difficulties might also want to continue learning and join community activities. An examination of how these people learn when they are confined to home should be conducted to understand these people's learning needs and how they can be helped to access learning opportunities. Finally, research on e-learning would be a valuable contribution to promoting lifelong learning. E-learning classes have already been

implemented in some cities. To what extent can e-learning help older adults to learn? Who would prefer to participate in e-learning. What are its advantages and disadvantages for older adults.

Research into Chinese older adult learning is still scarce, despite the fact that China is a country with a long history of respect for elders and a desire to place prime importance on education. Studies in older adult education have a lot to contribute to the literature of lifelong and older adult learning. Leung and Liu (2011) also pointed out that although older adults like to participate in learning activities, how much participation is good for their health and well-being has not been adequately studied. Their research pointed out that excessive participation in learning or social activities will cause stress to older adults (Leung & Liu, 2011). This is also an aspect that requires further study.

6.7 Conclusion

Everyone will experience aging, which is physically unavoidable. Through learning activities elders feel younger and healthier, both physically and psychologically. Chinese older adults want to have happiness, independence, care and support from family, as well as their own social life and contributions after retirement. The sources of happiness for Chinese older adults are: good physical and psychological health, which are key to successful aging (Walker, 2002), financial security, love from family members, contributions to family life, and satisfactory social connections. Additionally, when participating in educational activities Chinese older adults become more aware of their own interests and are more willing to understand themselves and look for the meaning of their life.

However, after retirement, the challenge to older adults is the feeling of loss due to social role changes. Work is no longer a source to value or achievement. In order to seek their worthiness, sense of achievement and identity, learning takes place. Learning provides older adults opportunities for social participation and volunteer work, which are considered a great

help to “smooth transition to retirement” (Lin et al., 2013, p. 83). Activities increase older adults’ confidence when they acquire new skills and knowledge so that they realize their intellectual capability. When they start to use the knowledge learned to help others and receive recognition, they find a sense of achievement and become independent, which can help them live a better and happier life.

Learning also helps older adults maintain connection with the developing society, as well as social connection with people who have the same interests. Having more friends builds elders’ confidence and optimism. They are more likely to become involved in social activities such as volunteer work, which creates a positive image and brings social approval to older adults, as well as self-respect (Siegrist et al., 2004). Older adults can also become more open minded. Learning broadens their horizons and there seems to be more things for them to explore and do. They are also willing to contribute their experience and knowledge whenever is needed. Older adults are the key generation for delivering traditional Chinese culture and moral essence to the younger generation. They can have great influence on education, especially early childhood education, since most often older adults are taking care of their grandchildren.

Learning can bring benefits to older adult life. It is an effective facilitator of successful aging. The Chinese government needs to put more effort into encouraging learning among older adults and make them aware of the benefits of learning. At the same time, more investment is needed in the supplementary facilities of learning institutions for older adults. The public should think rationally about older adults, as everyone will become old one day. All citizens should work together to create a harmonious society without bias and discrimination.

References

- Agar, M. H. (1980). *The professional stranger: An informal introduction to ethnography*. San Diego, CA: Academic Press.
- Ahrari, S., Othman, J., Hanssan, S., Samah, B. A. & D'silva, J. L. (2014). Active citizenship by active learning. *Journal of Applied Science*, 14(20), 2450-2459.
doi:10.3923/jas.2014.2450.2459
- Ai, J. W. (2012, June 16). Big transit of China's population. *YiCai*. Com. Retrieved from <http://www.yicai.com/news/2012/06/1820377.html>
- Aldridge, F., & Dutton, Y. (2009). *Building a society for all ages: Benefits for older people from learning in museums, libraries and archives*. Leicester: NIACE. Retrieved from http://shop.niace.org.uk/media/catalog/product/f/i/file_3_21.pdf
- American Council on Education (2008). *Mapping new directions: Higher education for older adults*. Retrieved from <http://www.lifelonglearningaccounts.org/pdf/mapdirections.pdf>
- Analects* retrieved from <http://nothingistic.org/library/confucius/analects/analects03.html>
- Anderson, G. (2011). Responding to the growing cost and prevalence of people with multiple chronic conditions. *Johns Hopkins Bloomberg School of Public health*. Retrieved from <http://www.oecd.org/health/health-systems/48245231.pdf>
- Angen, M. J. (2000). Evaluating interpretive inquiry: Reviewing the validity debate and opening the dialogue. *Qualitative Health Research*. 10(3), 378-395. doi: 10.1177/104973230001000308
- Antonucci, T., Okorodudu, C., & Akiyama, H. (2002). Well-being among older adults on different continents. *Journal of Social Issues*, 58(4), 617-626. doi: 10.1111/1540-4560.00280

- Aspin, D., & Chapman, J. (2000). Lifelong learning: Concepts and conceptions. *International Journal of Lifelong Education*, 19(1), 2-19. doi: 10.1080/026013700293421
- Atkinson, R. (1995). *The gift of stories: Practical and spiritual applications of autobiography, life stories, and personal mythmaking*. Westport, CT: Bergin & Garvey.
- Atkinson, R. (2007). The life story interview as a bridge in narrative inquiry. In D. J. Clandinin (Ed.), *Handbook of narrative inquiry – mapping a methodology* (pp. 224-247). California: Sage Publication.
- Bali, A. S., & Asher, M. G. (2012). *Coordinating healthcare and pension policies: an exploratory study*. Retrieved from <http://www.adbi.org/working-paper/2012/08/16/5216.coordinating.healthcare.pension.policies/>
- Ball, K., Berch, D., Helmers, K., Jobe, J., Leveck, M., Marsiske, M.,...& ATCIVE Study Group. (2002). Effects of cognitive training interventions with older adults: A randomized controlled trial. *Journal of the American Medical Association*, 288(18), 2271–2281. doi:10.1001/jama.288.18.2271
- Baltes, P. B., & Baltes, M. M. (1990). Psychological perspectives on successful aging: The model of selective optimization with compensation. In P. B. Baltes & M. M. Baltes (Eds.), *Successful aging: Perspectives from the behavioural sciences* (pp. 1-34). Cambridge: Cambridge University Press.
- Bean, C., & Laven, M. (2003). Adapting to seniors: Computer training for older adults. *Florida Libraries*, 46(2), 5-7.
- Beijing Daily (2013). *When it is not difficult to attend older adults universities*. Retrieved from: http://www.jyb.cn/crjy/cjsd/201303/t20130317_531262.html

- Benbow, S. M. (2009). Older people, mental health and learning. *International Psychogeriatric*, 21(5), 799–804. doi:10.1017/S1041610209009053
- Bergaglio, M. (2001). *Population growth in China: The basic characteristics of China's demographic transition*. Retrieved from <http://www.globalgeografia.it/temi/Population%20Growth%20in%20China.pdf>
- Birren, J. E., & Cochran, K. N. (2001). *Telling the stories of life through guided autobiography groups*. Baltimore: Johns Hopkins University Press.
- Bloom, D. E., & Canning, D. (2004). Global demographic change: dimensions and economic significance. *NBER Working Paper No. 10817*. Retrieved from <http://www.nber.org/papers/w10817>.
- Bloom, D. E., Boersch-Supan, A., McGee, P., & Seike, A. (2011). Population Aging: Facts, Challenges, and Responses. *Program on the Global Demography of aging Working Paper, 71*. Retrieved from http://www.hsph.harvard.edu/pgda/WorkingPapers/2011/PGDA_WP_71.pdf
- Bogdan, R. C., & Biklen, S. K. (2007). *Qualitative research for education: An introduction to theories and methods (5th ed.)*. Boston: Pearson Education.
- Bowling, A. (2007). Aspirations for older age in the 21st century: What is successful aging? *International Journal of Aging & Human Development*, 64(3), 263–297.
- Browne, K. (2005). Snowball sampling: using social networks to research non - heterosexual women. *International Journal of Social Research Methodology*, 8(1), 47-60.
doi:10.1080/1364557032000081663

- Buchanan, D., Boddy, D., & Mc Calman, J. (1988). Getting in, getting on, getting out and getting back. In A. Bryman (Ed.), *Doing research in organizations* (pp. 53-67). London: Routledge.
- Cai, F., & Du, Y. (2003). Destructive effects of culture revolution on physical and human capital. *China Economic Quarterly*, 2(4), 796-806. Retrieved from http://en.cnki.com.cn/Article_en/CJFDTOTAL-JJXU200303002.htm
- Carstensen, L. L. (2011). *A long, bright future: happiness, health, and financial security in an age of increased longevity*. New York: Public Affairs of the Perseus Group.
- Carter, S. M., & Little, M. (2011). Justifying knowledge, justifying method, taking action: epistemologies, methodologies and methods in qualitative research. *Qualitative Health Research*, 17, 1316-1328. doi: 10.1177/1049732307306927
- Central Committee of the Communist Party of China. (2006). *Resolution on major issues of building a harmonious socialist society*. Retrieved from <http://politics.people.com.cn/GB/1026/4932440.html>
- Charness, N. (2000). Can acquired knowledge compensate for age-related declines in cognitive efficiency? In S. H. Qualls & N. Abeles (Eds.), *Psychology and the Aging Revolution: How We Adapt to Longer Life* (pp.99-117). Washington, D. C.: American Psychological Association. doi: 10.1037/10363-006
- Chase, S. E. (2005). Narrative inquiry: multiple lenses, approaches, voices. In N. K. Denzin & Y. S. Lincoln (Ed.), *The SAGE handbook of qualitative inquiry* (3rd ed.) 9PP.651-679). Thousand Oaks, CA: Sage.

- Chase, S. E (2008). Narrative inquiry- multiple lenses, approaches, voices. In N. K. Denzin & Y. S. Lincoln (Eds.), *Collecting and interpreting qualitative materials* (pp.57-94). California: Sage Publication.
- Cheng, K.M., Jin, X. H., & Gu, X. B. (1999). From training to education: Lifelong learning in China. *Comparative Education*, 35(2), 119-129. doi:10.1080/03050069927928
- Cheng, M. D. (2002). The Chinese Population Structural Conditions since the Reform and Opening—up. *Studies on the History of China's Community Party*, 1, 30-34. Retrieved from http://en.cnki.com.cn/Article_en/CJFDTOTAL-ZGDS200201004.htm
- Chevalier, S., Fouquereau, E., Gillet, N., & Demulier, V. (2013). Development of the reasons for entrepreneurs' retirement decision inventory (RERDI) and preliminary evidence of its psychometric properties in a French sample. *J. Career Assess.* 21, 572–586.
- Chinese National Commission for UNESCO & Chinese Adult Education Association. (2008). *National Report: Adult education and learning in China: Development and present situation*. Retrieved from http://www.unesco.org/fileadmin/MULTIMEDIA/INSTITUTES/UIIL/confintea/pdf/National_Reports/Asia%20-%20Pacific/China.pdf
- Clandinin, D. J. (Ed.). (2006). *Handbook of narrative inquiry- mapping a methodology*. California: Sage Publication.
- Clandinin, D. J., & Connelly, M. (2000). *Narrative inquiry: Experience and story in qualitative research*. San Francisco: Jossey- Bass.

- Clark, M. C. (2001). Off the beaten path: some creative approaches to adult learning. *New Directions for Adult and Continuing Education*, 89, 83-91. Retrieved from <http://onlinelibrary.wiley.com/doi/10.1002/ace.11/pdf>
- Clarke, M. & Missingham, B. (2009). Active citizenship and social accountability. *Development Practice*, 19, 955-963.
- Clifton, J. (2009). *Ageing and well-being in an international context. Politics of ageing well Report 3*. London: Institute for public policy research. Retrieved from <http://www.researchonline.org.uk/sds/search/download.do%3Bjsessionid=E16300FA255E68270C0C7CFC3DEFD15C?ref=B13796>
- Cohler, B. (1993). Aging, morale, and meaning: The nexus of narrative. In T. R. Cole, W. A. Achembaum, P. L. Jakobi, & R. Kastenbaum (Eds.), *Voices and visions of aging* (pp.107-133). New York: Springer.
- Cole, A. L., & Knowles, J. G. (2001). *Lives in context: The art of life history research*. New York: Altamira Press.
- Commission of the European Communities. (2006, October 23). *Communication from the Commission. Adult learning: It is never too late to learn*. COM 614 final. Brussels. Retrieved from <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2006:0614:FIN:EN:PDF>
- Converse, J. M., & Schuman, H. (1974). *Conversations at random: Survey research as interviewers see it*. New York: John Wiley.
- Cooney, R. S., & Li, J. (1994). Household registration type and compliance with the “one child” policy in China, 1979-1988. *Demography*, 31(1), 21-32. Retrieved from <http://www.jstor.org/stable/2061906>

- Crabtree, B. F., & Miller, W. L. (1992). *Doing qualitative research*. London: Sage.
- Creswell, J. W. (2005). *Educational research: Planning, conducting and evaluating quantitative and qualitative research (2nd ed.)*. Upper Saddle River, N. J: Pearson Merrill Prentice Hall.
- Creswell, J. W. (2007). *Qualitative inquiry & research design. Choosing among five approaches (2nd ed.)*. CA: Sage Publications.
- Creswell, J. W. (2012). *Qualitative inquiry & research design: Choosing among five approaches (3rd ed.)*. California: Sage Publication.
- Cross, J. (2007). *Informal learning rediscovering the natural pathways that inspire innovation and performance*. San Francisco: Pfeiffer.
- Crowther, J., & Thutterland, P. (2008). *Lifelong learning: Concepts and contexts*. New York: Routledge.
- CTC-Health Org. (2004). *Study on growing tendency of the ageing population in China*.
- Czarniawska, B. (2004). *Narratives in social science research*. London: Sage Publication.
- Das, U. N. (2011). *Molecular basis of health and disease*. 491-512. doi: 10.10079/978-94-007-0495-4_15.
- Delanty, G., & Strydom, P. (Eds). (2003). *Philosophies of social science: The classic and contemporary readings*. Buckingham: Open University Press.
- Delors, J. (1996). *Learning: the treasure within*. Paris: UNESCO.
- Denzin, N. K. (1989). *Interpretive biography* (Vol. 17). Sage.
- Denzin, N. K. (1997). *Interpretive ethnographic: Ethnographic practice for 21st Century*. Thousand Oaks, CA: Sage.

- Denzin, N. K., & Lincoln, Y. S. (Eds.). (2005). *Sage handbook of qualitative research (3rd ed.)*. California: Sage Publication.
- Denzin, N. K., & Lincoln, Y. S. (Eds.). (2008). *Collecting and interpreting qualitative materials*. California: Sage Publication.
- Department of Education and Science. (2000). *Learning for life: White paper on adult education*. Dublin: Stationery Office. Retrieved from http://www.education.ie/en/Publications/Policy-Reports/fe_aduled_wp.pdf
- Department of Educational Development Planning under the Ministry of Education. (2007). *Concise statistical analysis of educational development in China in 2007*.
- Depp, C. A., & Jeste, D. V. (2009). Definitions and predictors of successful aging: A comprehensive review of larger quantitative studies. *FOCUS: The Journal of Lifelong Learning in Psychiatry*, 7(1), 137-150.
- Deutsch, F. M. (2006). Filial piety, patrilineality, and China's one-child policy. *Journal of Family Issues*, 27(3), 366-389. doi: 10.1177/0192513X05283097
- DeVaney, S. A. (2008). Financial issues of older adults. In J.J. Xiao (Ed.), *Handbook of Consumer finance research*. NY: Springer Science + Business Meida, LLC.
- Dewey, J. (1976). Creative democracy: The task before us. In J. Boydston (Ed.), *John Dewey: The later works, 1925-1953, volume 14* (pp. 224-230). Retrieved from <http://www.beloit.edu/~pbk/dewey.html>
- Dhunpath, R. (2010). Life History methodology: "Narradigm regained". *International Journal of Qualitative Studies in Education*, 12(5), 543-551.
- Diggs, J. (2008). Activity theory of aging. In S. Loue & M. Sajatovic (Eds.), *Encyclopedia of aging and public health* (pp. 79–81). New York, NY: Springer.

- Dillaway, H. E., & Byrnes, M. (2009). Reconsidering successful aging: a call for renewed and expanded academic critiques and conceptualizations. *Journal of Applied Gerontology*, 28(6), 702–722.
- Ding, Y. Y. (2010). *Negotiating individual space: an inquiry into the experiences of Chinese return migrants from Canada*. Calgary, AB.: Faculty of education, University of Calgary.
- Doherty Brooks (2012). Tips for teaching Adult Students. *NACTA Journal*, 92-93.
- Duan, K. (2013). *Study on life quality and its related influential factor for retired older adults*. Retrieved from: <http://www.doc88.com/p-8019030136408.html>
- Eaton, S. E. (2010). *Formal, non-formal and informal learning: the case of literacy, essential skills and language learning in Canada*. Calgary: Eaton International Consulting Inc. Retrieved from <http://library.copian.ca/research/item/8549>
- Egede, L. E. (2007). Major depression in individuals with chronic medical disorders: prevalence, correlates and association with health resource utilization, lost productivity and functional disability. *General Hospital Psychiatry*, 29, 409–416.
- Eno, R (2012). *The Analects of Confucius: An online teaching translation*. Retrieved from: [http://www.indiana.edu/~p374/Analects_of_Confucius_\(Eno-2012\).pdf](http://www.indiana.edu/~p374/Analects_of_Confucius_(Eno-2012).pdf)
- Erber, J. T. (2005). *Aging and older adulthood*. CA: Thomson Wadsworth.
- Erikson, E. H. (1982). *The life cycle completed: Review*. New York: Norton.
- European Commission. (2000). A memorandum on Lifelong Learning, Commission Staff Working Party, *Brussels EC DG Education and Culture*. Retrieved from <http://www.bologna-berlin2003.de/pdf/MemorandumEng.pdf>

- Fernández-Ballesteros, R., GARCIA, L. F., Abarca, D., Blanc, E., Efklides, A., Moraitou, D., ... & Patricia, S. (2010). The concept of 'ageing well' in ten Latin American and European countries. *Ageing and Society*, 30(01), 41-56.
- Field, J. (2004). *Lifelong learning and cultural change: A European perspective. Conference on Lifelong Learning and New Learning Culture*. Retrieved from http://lllp.iugaza.edu.ps/Files_Uploads/634714347660806778.pdf
- Field, J. (2006). *Lifelong learning and the new educational order*. England: Trentham Books.
- Field, J. (2009). *Well-being and happiness: Inquiry into the future of lifelong learning (Thematic paper 4)*. Leicester, UK: National Institute of Adult Continuing Education. Retrieved November 16, 2013, from http://www.academia.edu/2550251/Well-being_and_happiness
- Findsen, B. (2005). *Learning Later*. Florida: Krieger Publishing Company.
- Findsen, B. (2007). Freirean Philosophy and Pedagogy in the Adult Education Context: The Case of Older Adults' Learning. *Studies Philosophy Education*, 26:545–559. doi: 10.1007/s11217-007-9063-1
- Findsen, B. (2012). Religious institutions as Sites of learning for Older Adults. *New Directions for Adult and Continuing Education*, 133, 71-82. doi: 10.1002/ace.20008
- Findsen, B., & Formosa, M. (2011). *Lifelong learning in later life*. Rotterdam: Sense Publishers.
- Fischer, R. S., Norberg, A., & Lundman, B. (2008). Embracing opposites: Meanings of growing old as narrated by people aged 85. *International Journal of Aging and Human Development*, 67(3), 259–271. doi: 10.2190/AG.67.3.d

- Fok, S. Y. (2010). The meaning of the learning experiences of older adults in Hong Kong. *Educational Gerontology*, 36(4), 298-311.
- Fontana, A., & Frey, J. H. (2008). The interview – from neutral stance to political involvement. In N. K. Denzin & Y. S Lincoln (Eds.), *Collecting and interpreting qualitative materials* (pp.695-727). California: Sage Publication.
- Formosa, M. (2010b). Universities of the Third Age: A rationale for transformative education in later life. *Journal of Transformative Education*, 8(3), 197–219.
- Gale, D. (2012). Longevity in the 21st Century: Re-evaluating the ageing baby boomers’ role. *The New Bioethics*, 18(1), 50–67. doi: 10.1179/2050287713Z.0000000004
- Gallo, W. T., Bradley, E. H., Siegel, M., & Kasl, S. (2000). Health effects of involuntary job loss among older workers: findings from the health and retirement survey. *Journal of Gerontology B. Psychology, Science. Social. Science*. 55, S131–40.
- Gergen, M. M., & Gergen, K. J. (1993). Narratives of the gendered body in popular autobiography. In R. Josselson & A. Lieblich (Eds.), *The narrative study of lives* (Vol. 1, pp.191-218). Newbury Park, CA: Sage.
- Ginn, J., & Arber, S. (1995). “Only connect”. Gender relations and ageing. In S. Arber & J. Ginn (Eds.), *Connecting gender and ageing: A sociological approach* (pp. 1 –14). Buckingham: Open University Press.
- Glanz, D. & Neikrug, S. (1997). Seniors as researchers in the study of ageing: Learning and doing. *The Gerontologist*, 37, 823-826.
- Gobo, G. (2011). Ethnography. In D. Silverman (Ed.), *Qualitative research (3rd ed)* (pp.15-36). London: Sage Publication.
- Gorden, R. L. (1992). *Basic interviewing skills*. Itasca, IL: Peacock.

- Gorman, M. (1999). Development and the rights of older people. In J. Randel et al., (Eds.), *The ageing and development report: Poverty, independence and the world's older people* (pp.3-21). London: Earthscan Publications Ltd.
- Guest Editorial (2011). Intergenerational Family Support for Chinese Older Adults. *International Journal of Social Welfare*, 2011 (20), S1-3. doi: 10.1111/j.1468-2397.2011.00831.x
- Guo, S. B. (1996). Adult teaching and learning in China. *Convergence*, 29(1), 21-32.
- Guo, S. B. (2014). Immigrants as active citizens: exploring the volunteering experience of Chinese immigrants in Vancouver. *Globalization, Societies and Education*, 12(1), 51-70. doi: 10.1080/14767724.2013.858527
- Han Yu (AD 802), *Shi Shuo*. Chang Li Xian Sheng Ji.
- Hao, K., & Wang, R. (2009). *Research and Policy Development in Lifelong Learning in China*. CMEF – Réunion à Pékin. Retrieved from <http://cma-lifelonglearning.org/doc/Research%20and%20Policy%20Development%20in%20Lifelong%20Learning%20in%20China.pdf>
- Harding, S. (1987). Introduction: Is there a feminist method? In S. Harding (Ed.), *Feminism and methodology: Social science issues* (pp. 1-14). Bloomington: Indiana University Press.
- Hatch, J. A., & Wisniewski, R. (1995). Life history and narrative: questions, issues, and exemplary works. In J. A. Hatch & R. Wisniewski (Eds.), *Life history and narrative* (pp.113-131). London: Falmer Press.
- Hayhoe, R. (2008). Philosophy and comparative education: What can we learn from East Asia? In K. Mundy, K. Bickmore & R. Hayhoe et al. (Eds.), *Comparative and*

- International Education: Issues for teachers* (pp. 23–48). Toronto, Canada: Canadian Scholars' Press.
- Hesketh, T., Li, L., & Zhu, W. X. (2005). The effect of China's One Child Policy after 25 years. *The New England Journal of Medicine*. Retrieved from www.nejm.org
- Hildon, Z., Montgomery, S. M., Blane, D., Wiggins, R. D., & Netuveli, G. (2009). Examining resilience of quality of life in the face of health-related and psychosocial adversity at older ages: What is “right” about the way we age? *The Gerontologist*, *gnp067*.
- Hilton, J.M., Gonzalez, C. A., Saleh, M., Maitoz, R., Anngela-Cole, L. (2012). Perceptions of Successful Aging among Older Latinos, in Cross-Cultural Context. *Journal of Cross Culture Gerontology*, *2012(27)*:183–199.
- Hitchcock, G., & Hughes, D. (1989). *Research and the teacher: A qualitative introduction to school-based research*. London: Routledge.
- Horn, J., & Cattell, R. B. (1967). Age differences in fluid and crystalized intelligence. *Acta Psychologica*, *26*, 107-129. Retrieved from <http://www.sciencedirect.com/science/article/pii/000169186790011X>
- Houle, C. O. (1961). *The inquiring mind*. Madison, WI: University of Wisconsin Press
- House of Commons Canada. (2012). *Chronic diseases related to aging and health promotion and disease prevention*. Retrieved from <http://parl.gc.ca>.
- Hu, D. C. (2008). China continuing education in the context of economic globalization. *Proceedings of the 11th IACEE World Conference on Continuing Engineering Education* (WCCEE). Retrieved from <https://smartech.gatech.edu/handle/1853/24494>

- Huang, J., & Shi, W. P. (2008). Policies and practices of lifelong learning in China. *International Journal of Lifelong Education*, 27(5), 499–508. doi: 10.1080/02601370802051603
- Huberman, A. M., & Miles, M. B. (1994). Data management and analysis methods. In N. K. Denzin & Y. S. Lincoln (Eds.), *Handbook of Qualitative Research* (pp.428-444). CA: Thousand Oaks, Sage.
- Huxley, P., & Thornicroft, G. (2003). Social inclusion, social quality and mental illness. *The British Journal of Psychiatry*, 182(4), 289-290. doi: 10.1192/bjp.182.4.289
- Ice, G. H. (2005). Biological anthropology and aging. *Journal of Cross-Cultural Gerontology*, 20, 87-90. doi: 10.1007/s10823-005-9084-6.
- Iwamasa, G. Y. & Iwasaki, M. (2011). A New Multidimensional Model of Successful Aging: Perceptions of Japanese American Older Adults. *Journal of Cross Culture Gerontology*, 26, 261–278. doi: 10.1007/s10823-011-9147-9
- Jackson, R., Karp, J., Patrick, E., & Thrower, A. (2006). *Social constructivism vignette*. Retrieved from http://www.projects.coe.uga.edu/epltt/index.php?title=Social_Constructivism accessed 19 May 2012
- Jackson, R., Nakashima, K., & Howe, N. (2008). *China's long march to retirement reform: The graying of the middle kingdom revisited*. Washington: CSIS Prudential Foundation.
- James, J. B., Besen, E., Matz-Costa, C., & Pitt-Catsoupes, M. (2010). Engaged as we age: The end of retirement as we know it. *The Sloan Center on Aging and Work, Issue Brief* 24. Retrieved February 17, 2010, from http://agingandwork.bc.edu/documents/IB24_EngagedAsWeAge.pdf.

- Jamieson, A. (2007). Higher education study in later life: what is the point ? *Ageing and Society*, 27(03), 363-384.
- Jarvis, P. (1997). *Ethics and the education of adult in late modern society*. Leicester: NIACE
- Jarvis, P. (2004). *Adult education and lifelong learning: Theory and practice (3rd ed.)*. London: Routledge Falmer. Retrieved from:[http://books.google.ca/books?hl=en&lr=&id=SMMgRnWmf3YC&oi=fnd&pg=PP1&dq=Jarvis,+P.+\(2004\).+Adult+education+and+lifelong+learning:+Theory+and+practice+\(3rd+ed.\),+London:+Routledge+Falmer.&ots=HL-YeQuPxd&sig=PEpZnPqcAFMY2XaFadcdGLWRQ9c#v=onepage&q&f=false](http://books.google.ca/books?hl=en&lr=&id=SMMgRnWmf3YC&oi=fnd&pg=PP1&dq=Jarvis,+P.+(2004).+Adult+education+and+lifelong+learning:+Theory+and+practice+(3rd+ed.),+London:+Routledge+Falmer.&ots=HL-YeQuPxd&sig=PEpZnPqcAFMY2XaFadcdGLWRQ9c#v=onepage&q&f=false)
- Jarvis, P. (2006). *Lifelong learning and the learning society, Volume 1: Towards a comprehensive theory of human learning*. New York: Routledge.
- Jarvis, P. (2007). *Lifelong learning and the learning society, Volume 2: Globalization, lifelong learning and the learning society, sociological perspectives*. New York: Routledge.
- Jarvis, P. (2008). *Lifelong learning and the learning society, Volume 3: Democracy, lifelong learning and the learning society, active citizenship in a late modern age*. New York: Routledge.
- Jarvis, P. (2012). *Adult learning in the social context*. New York: Routledge.
- Jiang, Z. (1999a). *Improving the quality of general public should be the ultimate purpose of education*. Speech presented at the National Education Conference (Beijing, 15 June)
- Johnson, Renee M. (2002). Adverse behavioral and emotional outcomes from child abuse and witnessed violence. *Child Maltreatment*, 7, 179-186.

- Kennedy, P. (2002). Learning cultures and learning styles: myth-understandings about adult (Hong Kong) Chinese learners. *International Journal of Lifelong Education*, 21(5), 430-445. doi: 10.1080/02601370210156745
- Knowles, M. S. (1970). *The modern practice of adult education (Vol. 41)*. New York: New York Association Press. Retrieved from:
http://www.cumc.columbia.edu/dept/medicine/hospitalists/downloads/cc4_articles/Education%20Theory/Andragogy.pdf
- Knowles, M. S. (1980). *The modern practice of adult education: From pedagogy to andragogy (revised and updated)*. Chicago, IL: Association Press.
- Kramp, M. K. (2004). Exploring life and experience through narrative inquiry. In K. deMarrais & D. Lapan (Eds.), *Foundations for research-Method of inquiry in education and the Social Sciences* (pp.103-121). 103-New Jersey: Lawrence Erlbaum Associates, Inc.
- Laslett, P. (1989). A fresh map of life: The emergence of the third age. *Population and Development Review*, 16(2), 363-367. Retrieved from
<http://www.jstor.org/stable/1971596>
- Lawton, P.H. & La Porte, A. M. (2013). Beyond traditional art education: Transformative lifelong learning in community-based settings with older adults. *National Art Education Association Studies in Art idvcation: A Journal of Issues and Research* 2013, 54(4), 310-320.
- Lee, R. (1993). *Doing research on sensitive topics*. London: Sage.
- Lee, W. O. (1996). The cultural context for Chinese learners: conceptions of learning in the Confucian tradition. In D. Watkins and J. Biggs (Eds.), *The Chinese Learner: Cultural,*

- Psychological and Contextual Influences* (pp. 25–41). Hong Kong: The Comparative Education Research Centre, Faculty of Education, University of Hong Kong.
- Leung, A., Lui, Y. H., & Chi, I. (2005). Later life learning experience among Chinese elderly in Hong Kong. *Gerontology and Geriatrics Education*, 26(2), 1–15. doi: 10.1300/J021v26n02_01
- Leung, S.Y. & Liu, C.P. (2011). Lifelong education, quality of life and self-efficacy of Chinese older adults. *Educational Gerontology*, 37(11), 967-981. doi: 10.1080/03601277.2010.492732
- Levinson, D. J., & Levinson, J. D. (1996). *The seasons of a woman's life*. New York: Knopf
- Li, R. F., & Tong, C. L. (2007). Issues about spiritual endowment for older adults in China. *9med.net*. Retrieved from <http://journal.9med.net/qikan/article.php?id=295817>
- Li, Y. P., Chen, Y. M., & Chen, C. H. (2013). Volunteer transitions and physical and psychological health among older adults in Taiwan. *Journals of Gerontology, Series B: Psychological Science and Social Sciences*, 68(6), 997-1008. doi: 10.1093/geronb/gbt098.
- Lin, W. I., Chen, M. L., & Cheng, J. C. (2013). The promotion of active aging in Taiwan. *Ageing International* (2014), 39, 81–96. doi: 10.1007/s12126-013-9192-5
- Manheimer, R. J., & Moskow-Mckenzie, D. (1995). Transforming older adult education: An emerging paradigm from a nationwide study. *Educational Gerontology*, 21(6), 613–632. doi: 10.1080/0360127950210606
- Marsha, R. (2002). Narratives and stories in adult teaching and learning. *ERIC Digest*, 241. Document no: EDO-CE-02-241. Retrieved from <http://www.calpro-online.org/eric/docs/dig241.pdf>

- Marshall, C., & Rossman, G. B. (2010). *Designing qualitative research (5th ed.)*. CA: Thousand Oaks, Sage.
- Marshall, M. N. (1996). Sampling for qualitative research. *Family Practice, 13*(6), 522-525.
doi: 10.1093/fampra/13.6.522
- Martin, I. (2000). Reconstituting the agora: Towards an alternative politics of lifelong learning. In T. Sork, V-L. Chapman & R. St Clair (Eds.), *Proceedings of the 41st annual AERC 2000 international conference* (pp.255-260). Vancouver: University of British Columbia. Retrieved from <http://files.eric.ed.gov/fulltext/ED452417.pdf#page=271>
- Martinson, B. A., Crain, N., Pronk, P., O'Connor, & Maciocek, M. (2003). Changes in physical activity and short-term changes in health care charges: A prospective cohort study of older adults. *Prev. Med. 37*:319–326.
- Maslow, A. H. (1943). A theory of human motivation. *Psychological Review 50*, 370-396.
Retrieved from <http://dx.doi.org/10.1037/h0054346>
- McClusky, H. Y. (1974). Education for aging: the scope of the field and perspectives for the future. In S. Grabowski & W. D. Mason (Eds.), *Learning for aging*. Washington, D. C.: Association of the USA.
- McNair, S. (2012). Older people's learning in 2012. A survey summary report. Leicester: NIACE. Retrieved from <http://shop.niace.org.uk/older-peoples-learning-2012.html>
- Medel-Añonuevo, C., Ohsako, T., & Mauch, W. (2001). *Revisiting lifelong learning for the 21st Century*. UNESCO Institution for Education. Philippines: Art Angel Printshop.
Retrieved from <http://www.unesco.org/education/uie/pdf/revisitingLLL.pdf>

- Mehrotra, C. M. (2003). In defence of offering educational programs for older adults. *Educational Gerontology*, 29(8), 645-655. Retrieved from <http://www.tandfonline.com/action/showCitFormats?doi=10.1080/03601270390225631>
- Menec, V. H. (2003). The relationship between everyday activities and successful aging: A 6-year longitudinal study. *Journal of Gerontology Social Sciences*, 58 B (2), s74-s82. doi: 10.1093/geronb/58.2.S74
- Merriam, B. & Kee, Y. (2014). Promoting community wellbeing: The case for lifelong learning for older adults. *Adult Education Quarterly*, 64, 128-144. doi:10.1177/0741713613513633
- Merriam, S. B. (Ed.). (2001). *The new update of adult learning theory. New Directions of Adult and Continuing Education, no.89*. San Francisco: Jossey-Bass.
- Merriam, S. B. (Ed.). (2008). *Third update on adult learning theory. New Directions for Adult and Continuing Education*. San Francisco: Jossey-Bass.
- Merriam, S. B., & Caffarella, R. S. (1999). *Learning in adulthood (2nd ed.)*. San Francisco: Jossey-Bass
- Merriam, S. B., & Kim, A. (2004). Motivations for learning among older adults in a learning in retirement institute. *Educational Gerontology*, 30, 441-455. doi: 10.1080=03601270490445069
- Mezirow, J. (1997). "Transformative learning: Theory to practice." In P. Cranton (ed.), *Transformative Learning in Action: Insights from Practice. New Directions in Adult and Continuing Education, no. 74*. San Francisco: Jossey-Bass, 1997.
- Mezirow, J. (1991). *Transformative dimensions of adult learning*. San Francisco: Jossey-Bass.

Midwinter, E. (1996). *Thriving people: The growth and prospects of the U3A in the UK*.

London: The University of the Third Age (U3A).

Ming Sha Shi Yi Shu – Tai Gong Jia Jiao

Moody, H.R. (1976). 'Philosophical presuppositions of education for old age'. *Educational Gerontology*, 1(1), 1–16.

Moody, H. R. (2005). From successful aging to conscious aging. In M. Wykle, P. Whitehouse & D. Morris (Eds.), *Successful aging through the life span: Intergenerational issues in health* (pp. 55-68). New York: Springer.

Morgan, W. J. (2008). Social capital, citizenship and continuing education: What are the connections? *International Journal of Continuing Education and Lifelong Learning*, 1(1), 35–45. Retrieved from

<http://www.nottingham.ac.uk/education/documents/research/unesco/socialcapitalhk.pdf>

Morse, J. M., Barrett, M., Mayan, M., Olson, K., & Spiers, J. (2002). Verification strategies for establishing reliability and validity in qualitative research. *International Journal of Qualitative Methods*, 2. Retrieved from <http://www.ualberta.ca/~ijqm/>

National Center for Chronic Disease Prevention and Health Promotion Division of Population Health. (2012). *Older employees in the workplace*. Retrieved from

[http://www.cdc.gov/nationalhealthysite/docs/Issue_Brief_No_1_Older_Employees_in_the_Workplace_7-12-2012_FINAL_\(508\).pdf](http://www.cdc.gov/nationalhealthysite/docs/Issue_Brief_No_1_Older_Employees_in_the_Workplace_7-12-2012_FINAL_(508).pdf)

Neuhauser, P. C. (1993). *Corporate legends and lore: The Power of storytelling as a management tool*. New York: McGraw-Hill.

- NIACE. (2010). *Enhancing informal adult learning for older people in care settings. Guidance for learning providers*. Retrieved from: <http://shop.niace.org.uk/care-settings-learning-providers.html>
- NIACE. (2011). *Social value of adult learning for adult social care*. Retrieved from http://shop.niace.org.uk/media/catalog/product/s/o/social_value_for_adult_social_care_1.pdf
- Novak, J. D., & Gowin, D. B. (2008). *Learning how to learn*. New York: Cambridge University Press.
- Olsen, W. (2004). Triangulation in social research: *Qualitative and quantitative methods can really be mixed*. Retrieved from <http://research.apc.org/images/5/54/Triangulation.pdf>
- Ouwehand, C., de Ridder, D. T. D., & Bensing, J. M. (2006). A review of successful aging models: Proposing proactive coping as an important additional strategy. *Clinical Psychology Review, 27*, 873-884. Retrieved from www.sciencedirect.com.
- Oxford, R., & Anderson, N. (1995). A cross-cultural view of learning styles. *Language Teaching, 28*, 201–215. Retrieved from <http://dx.doi.org/10.1017/S0261444800000446>
- Patton, M. Q. (1980). *Qualitative evaluation methods*. Beverley Hills, CA: Sage.
- Pinnegar, S., & Daynes, J. G. (2006). Locating narrative inquiry historically – thematics in the turn to narrative. In D. J. Clandinin (Ed.), *Handbook of narrative inquiry – mapping a methodology* (pp.20-25). California: Sage Publication.
- Plessis, K., Anstey, K. J., & Schlumpp, A. (2011). Older adults' training courses: considerations for course design and the development of learning materials. *Australia Journal of Adult learning, 51*(1), 162-174. Retrieved from <http://search.informit.com.au/documentSummary;dn=238199199988715;res=IELHSS>

- Polkinghorne, D. E. (1988). *Narrative knowing and the human sciences*. Albany: State University of New York Press.
- Polkinghorne, D. E. (1995). Narrative configuration in qualitative analysis. In J. A. Hatch & R. Wisniewski (Eds.), *Life history and narrative* (pp.3-25). London: Falmer.
- Rosenthal, R. L. (2008). Older computer-literate women: Their motivations, obstacles and path to success. *Educational Gerontology*, 34, 610–626.
- Rossiter, M. (2002). Narrative and stories in adult teaching and learning. *ERIC digest*, No.241. ERIC Number: ED473147
- Rowe, J. W., & Kahn, R. L. (1987). Human aging: Usual and successful. *Science*, 237(4811), 143-149. doi: 10.1126/science.3299702
- Rowe, J. W., & Kahn, R. L. (1997). Successful aging. *The Gerontologist*, 37(4), 433-440. doi: 10.1093/geront/37.4.433
- Sadler, E., & Biggs, S. (2006). Exploring the links between spirituality and “successful ageing”. *Journal of Social Work Practice*, 20(3), 267–280.
- Saraceno, C. (2001). *Social exclusion. Culture roots and diversities of a popular concept*. Retrieved from <http://www.childpolicyintl.org/publications/Saraceno.pdf>
- Seale, C. (Ed.). (2004). *Researching society and culture (2nd ed.)*. CA: Thousand Oakes, Sage.
- Seidman, I. E. (1991). *Interviewing as qualitative research. A guide for researchers in education and social sciences*. New York: Teachers College, Columbia University.
- Shultz, K. S., Morton, K. R., & Weckerle, J. R. (1998). The influence of push and pull factors on voluntary and involuntary early retirees’ retirement decision and adjustment. *Journal of Vocational Behaviour*. 53, 45–57. Retrieved from

<http://www.ouderenenarbeid.be/Documenten/artikel%20Shultz%20Morton%20Weckerle.pdf>

- Shultz, K. S., & Wang, M. (2011). Psychological perspectives on the changing nature of retirement. *American Psychologist*, *66*, 170-179. Doi: 10.1037/a0022411
- Siedle, R. (2011). Principles and practices of mature-age education at U3As. *Australian Journal of Adult Learning*, *51*(3), 567-582. Retrieved from <http://www.u3asunshine.org.au/sc/wp-content/uploads/2012/10/u3as.pdf>
- Siegrist, J., Knesebeck, O., & Pollack, C. E. (2004). Social productivity and well-being of older people: A sociological exploration. *Social Theory and Health*, *2*(1), 1-17. Retrieved from http://www.share-project.org/new_sites/seh/wahrendorf.pdf
- Sikes, P., Measor, L., & Wood, P. (1985). *Teachers' careers: crisis and continuities*. Lewes, UK: Falmer Press.
- Sloane-Seale, A., & Kops, B. (2008). Older adults in lifelong learning: Participation and successful aging. *Canadian Journal of University Continuing Education*, *34*(1), 37-62. Retrieved from <https://ejournals.library.ualberta.ca/index.php/cjuce-rcepu/article/view/19938/15456>
- Sloane-Seale, A., & Kops, B. (2010). Older adults' participation in education and successful aging: Implications for university continuing education in Canada. *Canadian Journal of University Continuing Education*, *36*(1), 1-29. Retrieved from <http://ejournals.library.ualberta.ca/index.php/cjuce-rcepu>
- Soloway, I., & Walters, J. (1977). Working the corner: The ethics and legality of ethnographic fieldwork among active heroin addicts. *Street Ethnography: Selected Studies of Crime and Drug Use in Natural Settings*. Beverly Hills, CA: Sage, 159-178.

- Soni, S. (2012). Lifelong learning- education and training. Learning and Teaching Methodology. *FIG Working Week 2012: Knowing to manage the territory, protect the environment, evaluate the cultural heritage Rome, Italy*. Retrieved from https://www.fig.net/pub/fig2012/papers/ts05i/TS05I_soni_5945.pdf
- Sparkes, A. (1994). Self, silence and invisibility as a beginning teacher: A life history of lesbian experience. *British Journal of Sociology of Education*, 15(1), 93-118. Retrieved from <http://www.jstor.org/stable/1393351>
- Spence, L. & Radunovich, H. L. (2013). *Developing intergenerational relationships*. Retrieved from <http://edis.ifas.ufl.edu/fy1007>
- Stanistreet, J., Ward, J., & Farmer, S. (2013). On the up: the rewards of adult learning. Leicester: NIACE. Retrieved from <http://shop.niace.org.uk/on-the-up.html>
- Statistical Bulletin of Educational Development in China. (1997-2006). *China Education Daily*
- Statistical Bulletin of Educational Development in China. (1997-2007). *China Education Daily*
- Stemler, S. (2001). An overview of content analysis. *Practical Assessment, Research & Evaluation*, 7(17). Retrieved from <http://PAREonline.net/getvn.asp?v=7&n=17>
- Sternberg, S. A., & Gordon, M. (1998). Who are older adults? *Demographics and major health problems. Periodontology 2000*. 16, 9-15. doi: 10.1111/j.1600-0757.1998.tb00112.x
- Szinovacz, M. E., & Davey, A. (2005). Predictors of perceptions of involuntary retirement. *Gerontologist* 45, 36-47. doi: 10.1093/geront/45.1.36

- Takayama, N. (2010). *Managing pension and healthcare costs in rapidly ageing depopulating countries: The case of Japan*. Tokyo: Maurzen. Retrieved from <http://cis.ier.hit-u.ac.jp/Japanese/publication/cis/dp2012/dp582/text.pdf>
- Taylor, E. W. (2008). Transformative learning theory. In S. B. Merriam (Ed.), *Third update on adult learning theory. New directions for adult and continuing education* (No. 119, pp. 5-15). San Francisco: Jossey-Bass.
- Thane, P. (1978). The muddled history of retiring at 60 and 65. *New Society*, 45(826), 234-236.
- The Chinese Academy of Social Sciences. (2013). *Annual report on development of the cause of ageing*.
- The coming of global aging. *Xin Hua Net*. Retrieved from http://news.xinhuanet.com/world/2011-07/21/c_121698997.htm
- The Committee on Aging Issue. (2006). *Report on the aging population*.
- The National Center for Chronic Disease Prevention and Health Promotion of United States. (2012). *Older employee in the workplace. No. 1*. Retrieved from [http://www.cdc.gov/nationalhealthworksite/docs/Issue_Brief_No_1_Older_Employees_in_the_Workplace_7-12-2012_FINAL\(508\).pdf](http://www.cdc.gov/nationalhealthworksite/docs/Issue_Brief_No_1_Older_Employees_in_the_Workplace_7-12-2012_FINAL(508).pdf)
- UNESCO. (2013, February 12-14). Rethinking education in a changing world. Meeting of the senior experts' group. *Education Research and Foresight*. Document no: ED/2013/ERF/01 REV.
- United Nations Population Division. (1999a). *World population prospects: The 1998 Revision: Volume I: Comprehensive Tables*. ST/ESA/SER.A/177. New York: Department of Economic and Social Affairs, United Nations.

- United Nations Population Division. (1999b). *World population prospects: The 1998 Revision: Volume II: The Sex and Age Distribution of the World Population*. ST/ESA/SER.A/180. New York: Department of Economic and Social Affairs, United Nations.
- United Nations Population Division. (1999c). *World population prospects: The 1998 Revision: Volume III: Analytical Report*. ESA/P/WP.156, 18 November 1999. New York: Department of Economic and Social Affairs, United Nations.
- United Nations Population Division. (2001). *World population aging: 1950-2050*. ST/ESA/SER.A/207. New York: Department of Economic and Social Affairs, United Nations.
- United Nations. (2010). *World population prospects 2008 revision*. New York: United Nations.
- Valentine, T. (1997). United States of America: The current predominance of learning for the job. In P. Belanger & S. Valdivielso (Eds.), *The emergence of learning societies: Who participates in adult learning?* (pp.95-108). New York: Elsevier.
- Van der Veen, R., & Preece, J. (2005). Poverty reduction and adult education: Beyond basic education. *International Journal of Lifelong Education*, 24(5), 381–391. Retrieved from [http://books.google.ca/books?id=8tdifLZnFqAC&pg=PR13&lpg=PR13&dq=Van+der+Veen,+R.,+%26+Preece,+J.+\(2005\).+Poverty+reduction+and+adult+education:+Beyond+basic+education.+International+Journal+of+Lifelong+Education,+24\(5\),+381%E2%80%93391.&source=bl&ots=mGatorDuOf&sig=Uleo6XXqGFr19jdFGT3odGvOhMg&hl=en&sa=X&ei=oydbVOKyF8TuoASFo4LAAw&ved=0CCYQ6AEwAg#v=onepage&q=Van%20der%20Veen%2C%20R.%2C%20%26%20Preece%2C%20J.%20\(2005\).%20](http://books.google.ca/books?id=8tdifLZnFqAC&pg=PR13&lpg=PR13&dq=Van+der+Veen,+R.,+%26+Preece,+J.+(2005).+Poverty+reduction+and+adult+education:+Beyond+basic+education.+International+Journal+of+Lifelong+Education,+24(5),+381%E2%80%93391.&source=bl&ots=mGatorDuOf&sig=Uleo6XXqGFr19jdFGT3odGvOhMg&hl=en&sa=X&ei=oydbVOKyF8TuoASFo4LAAw&ved=0CCYQ6AEwAg#v=onepage&q=Van%20der%20Veen%2C%20R.%2C%20%26%20Preece%2C%20J.%20(2005).%20)

Poverty%20reduction%20and%20adult%20education%3A%20Beyond%20basic%20education.%20International%20Journal%20of%20Lifelong%20Education%2C%2024(5)%2C%20381%E2%80%93391.&f=false

- Van Solinge, H., & Henkens, K. (2007). Involuntary retirement: the role of restrictive circumstances, timing, and social embeddedness. *Journal of Gerontology B Psychol. Sci. Soc. Sci.* 62, S295–303. Retrieved from <https://www.nidi.knaw.nl/shared/content/output/2007/jog-62b-05-vansolinge.pdf>
- Vieira, E. R., Brown, E., & Raue, P. (2014). Depression in older adults: screening and referral. *Journal of Geriatric Physical Therapy.* 37, 24-30. doi: 10.1519/JPT.0b013e31828df26f.
- Walker, A. (2002). A strategy for active ageing. *International Social Security Review*, 55(1), 121–139. doi: 10.1111/1468-246X.00118
- Wang, H. M. (2001). *Analysis on elder adult reemployment and its influential factors* (老年人再就业状况及影响因素分析).
- Wang, M. R. (1988). *China: Lessons from practice*. San Francisco: Jossey-Bass.
- Wang, M., & Shi, J. (2014). Psychological research on retirement. *Annual review of psychology*, 65, 209-233. doi: 10.1146/annurev-psych-010213-115131
- Wang, N. X., & Morgan, W. J. (2012). The harmonious society, social capital and lifelong learning in China: Emerging policies and practice. *International Journal of Continuing Education and Lifelong Learning*, 4(2), 1-15. Retrieved from <http://web.b.ebscohost.com/abstract?direct=true&profile=ehost&scope=site&authtype=crawler&jrnl=19977034&AN=77367978&h=c3dTCpy1y2z8QKDyt33NZNoAmsAVPR>

X5mdOaw0Kv6rs827x9K9YwahJZRnxB5KvAbSZfh8I40BomRB%2b%2fQ9OiXg%3d%3d&crl=c

Wang, N., & Morgan, W. (2012). The harmonious society, social capital and lifelong learning in China: Emerging policies and practice. *International Journal of Continuing Education and Lifelong Learning*, 4(2), 1. Retrieved

from:<http://www.nottinghamenterprise.com/education/documents/research/unesco/harmonious-societychina.pdf>

Watt, D. (2007). On becoming a qualitative researcher: the value of reflexivity. *The Qualitative Report*, 12(1), 82-101. Retrieved from

<http://files.eric.ed.gov/fulltext/EJ800164.pdf>

Weinstein, L. B. (2004). Lifelong learning benefits older adults,

Activities, Adaptation & Aging, 28(4), 1-12. doi: 10.1300/J016v28n04_01

Wenger, E., McDermott, R., & Snyder, W. M. (2002). *Cultivating communities of practice: A guide to managing knowledge*. Boston: Harvard Business School Press.

Whittemore, R., Chase, S. K., & Mandle, C. L. (2001). Validity in qualitative research.

Qualitative Health Research, 11(4), 522-537. doi: 10.1177/104973201129119299

WHO. (2002). *Active aging a policy framework*. Geneva: World Health Organization.

Retrieved from http://whqlibdoc.who.int/hq/2002/who_nmh_nph_02.8.pdf

Williamson, A. (1997). "You're never too old to learn!": Third-age perspectives on lifelong learning. *International Journal of Lifelong Education*, 16(3), 173-184. Retrieved from

<http://dx.doi.org/10.1080/0260137970160302>

- Williamson, A. (2000). Gender issues in older adults' participation in learning: Viewpoints and experiences of learners in the University of the Third Age (U3A). *Educational Gerontology*, 26(1): 49 –66. doi: 10.1080/036012700267394
- Willig, C. (2013). *Introducing to qualitative research in psychology (3rd ed.)*. New York: Open University Press.
- Wilson, G. (1995). I'm the eyes and she's the arms: Changes in gender roles in advanced old age. In S. Arber & J. Ginn (Eds.), *Connecting gender and ageing: A sociological approach* (pp. 98 –113). Buckingham: Open University Press.
- Withnall, A. (2012). Lifelong or long life? Learning in the later years. In D. N. Aspin, J. Chapman, K. Evans, & R. Bagnall (Eds.), *Second international handbook of lifelong learning* (Part 2, pp. 649–664). New York, NY: Springer.
- World Health Organization (WHO). (1999). *Ageing: Exploding the myths*. Retrieved November 16, 2013, from http://www.who.int/ageing/publications/exploding_myths/en/index.html
- World Health Organization. (2005). *Preventing chronic diseases: a vital investment*. Retrieved from http://www.who.int/chp/chronic_disease_report/en/.
- World Population Statistics. (2014). *Population of China 2014*. Retrieved from <http://www.worldpopulationstatistics.com/population-of-china-2014/>
- Xiao, X. (2012). Adaption to social needs, developing older adult education. *Journal of Beijing Radio and TV University*.
- Xing, G. (2010). A Buddhist-Confucius controversy on filial piety. *Journal of Chinese Philosophy*, 37(2), 248-260. doi: 10.1111/j.1540-6253.2010.01582.x

- Xiong, J. (2011). Understanding higher vocational education in China: Vocationalism vs Confucianism. *Frontier of Education China*, 6(4), 495–520. doi: 10.1007/s11516-011-0143-1
- Xu, B. (2010). Factors that influence older adults' life quality in nursing homes in Nanjing. *Chinese Gerontology*, 2010 (30). pp. 1121-1123.
- Yao, X. Z. (1999). Confucianism and its modern values: Confucian moral, educational and spiritual heritages revisited. *Journal of Belief & Values*, 20(1), 30–40. doi: 10.1080/1361767990200103
- Zhang, W. Y. (2008). Conceptions of lifelong learning in Confucian culture: Their impact on adult learners. *International Journal of Lifelong Education*, 27(5), 551-557. doi: 10.1080/02601370802051561
- Zhang, W. Y. (2011). Discussion on situation, education concept and strategies of open university for older adults in China. *China Academic Journal Electronic Publishing House*. Retrieved from <http://www.cdrtvu.com/upload/2011/10/199442347.pdf>
- Zhang, W. Y., & Chan, L. (2003). New insights from old practices: ODE practices in ancient China and its implications to Asia. *Global E-Journal of Open, Flexible & Distance Education*, 3(1), 76–84. Retrieved from [http://books.google.ca/books?id=ESzcAAAAQBAJ&pg=PA59&lpg=PA59&dq=Zhang,+W.+Y.,+%26+Chan,+L.+\(2003\).+New+insights+from+old+practices:+ODE+practices+in+ancient+China+and+its+implications+to+Asia.+Global+E-Journal+of+Open,+Flexible+%26+Distance+Education,+3\(1\),+76%E2%80%9384.&source=bl&ots=rK0px1X9Kj&sig=QWW3J_KS4-](http://books.google.ca/books?id=ESzcAAAAQBAJ&pg=PA59&lpg=PA59&dq=Zhang,+W.+Y.,+%26+Chan,+L.+(2003).+New+insights+from+old+practices:+ODE+practices+in+ancient+China+and+its+implications+to+Asia.+Global+E-Journal+of+Open,+Flexible+%26+Distance+Education,+3(1),+76%E2%80%9384.&source=bl&ots=rK0px1X9Kj&sig=QWW3J_KS4-)

[LRBiJRhKPh0K6kUQ&hl=en&sa=X&ei=TSbVKrpGoeqogT92IKoDA&ved=0CB0Q6AEwAA#v=onepage&q=Zhang%2C%20W.%20Y.%2C%20&f=false](https://www.google.com/search?q=Zhang%2C%20W.%20Y.%2C%20&hl=en&sa=X&ei=TSbVKrpGoeqogT92IKoDA&ved=0CB0Q6AEwAA#v=onepage&q=Zhang%2C%20W.%20Y.%2C%20&f=false)

Zhong, Q. (1979). *The strategy of lifelong education in spare time-education system and measures*. Beijing: Education Press.

Zizza, C. A., Ellison, K. J., & Wernette, C. M. (2009). Total water intakers of Community-living middle-old and oldest-old adults. *Journal of Gerontol A Biol Sci Med Sci*, 64A(4), 481-486. doi: 10.1093/Gerona/gln045.

APPENDIX A: RECRUITMENT LETTER (ENGLISH)

Dear all,

I'm a graduate student in the University of Calgary, Canada. Currently I'm conducting a study on the lifelong learning experience of retired older adults in China for the purpose of completing my master degree thesis. I would like to invite you to participate in my study.

The study involves interviews that invite you to share your previous and recent learning experiences, and the changes that happened in your life as a result of the learning activities. Also you are invited to critique and share your insight on the older adult learning development situation in China. The ethic of this research has been approved by the Conjoint Faculties Research Ethics Board at the University of Calgary, which guarantees that your personal interests will not be harmed and your personal life will not be impacted.

According to the age requirements in the retirement policy in China, I'm looking for volunteers who are between the age of 55 and 70, and participating in any of the programs in a university for older adults. Participation is voluntary, but highly appreciated. If you are selected to participate in the research, I will visit you for 3 times to conduct the interviews, which will last 1.5 hours per interview session. All interviews will be recorded. You have the right to decide the date, time and location of the interview. All personal information collected from you will be kept confidential. You have the right to refuse answering certain questions or to withdraw from the

research at any time with no constraints. If you decide to withdraw from the research, all your personal information collected will be destroyed.

If you would like to participate in the research, or if you have any further questions about the research, please feel free to contact me

Email address: nerissa.shan@gmail.com

Mobile phone: +1-587-228-3826 (Canada)

+ 86- 13466573390 (China)

Sincerely yours

Shan Wei

Graduates Studies, Werklund School of Education

University of Calgary

APPENDIX B: RECRUITMENT LETTER (CHINESE)

各位尊敬的长辈：

本人是加拿大卡尔加里大学的一名研究生，现在正在进行一项关于中国退休老人学习生活的研究，主旨是要探究学习活动对退休老人的身心，日常生活，以及对退休生活的看法有哪些影响。这项研究是为完成单薇（本人）的硕士毕业论文而做。在此本人诚挚的邀请您参加这项研究。

研究方式主要是通过对您的采访来了解您曾经的和现在相关学习的经验，以及学习活动对您的生活，尤其是退休生活有哪些影响。同时也希望您可以分享一些您对中国退休老人学习发展状况的独到见解，以及提出您的宝贵意见。此次研究已经通过卡尔加里大学研究道德委员会的批准，绝对不会给您的个人利益和生活带来不便或造成影响。

根据中国的退休政策，此次研究的主要对象是年龄在 55 岁和 80 岁之间的退休人员，并且目前正在海淀老年大学参加培训。此次的研究完全基于您自愿的基础上进行。如果您被选中参加此项研究，我会对您进行 3 的访问，每次访问时间为一个半小时。访问内容将被录音。访问日期，时间，地点完全由您决定。访问取得的关于您的所有信息将会被完全保密。在访问期间，您有权拒绝回答任何您不想回答的问题，并且可以随时选择终止参与此次研究。

如果您愿意参加此项研究，或者您有进一步的与研究相关问题，欢迎您通过以下方式和我联系

邮件地址：nerissa.shan@gmail.com

电话：1-587-228-3826（加拿大），86-13466573390（中国）

单薇

卡尔加里大学 Werklund 教育学院研究生部

Werklund School of Education

University of Calgary

APPENDIX C: CONSENT FORM (ENGLISH)



Name of Researcher, Faculty, Department, Telephone & Email:

Wei SHAN, Education, Adult Learning, mobile: 587-228-3826, email:
nerissa.shan@gmail.com

Supervisor:

Dr. Shibao, Guo, Faculty of Education

Title of Project:

“Live and Learn”: Journey of Lifelong Learning of Retired Older Adults in
Contemporary China

Sponsor:

N/A

This consent form, a copy of which has been given to you, is only part of the process of informed consent. If you need more details about the study, or information not included here, feel free to ask. Please take the time to read this carefully and to understand any accompanying information.

The University of Calgary Conjoint Faculties Research Ethics Board has approved this research study.

- **Purpose of the Study**

Aging does not only involve a process of physical and mental decay, it is constructed under cultural, economic and political factors as well. The purpose of this study is to examine the role of lifelong learning in facilitating healthy and successful aging of retired older adults in China, with a focus on perspectives of older adults on healthy aging, provision of lifelong learning programs for older adults, and contributions of lifelong learning to healthy aging and active citizenship.

- **What Will I Be Asked To Do**

Each participant will be asked to participate in three interview sessions. The main purpose of interviews is to examine their learning experience through narration. In order to generate the conversation, some topics will be discussed, topics are categorized in themes. Each interview will take about 1.5hours to 2 hours, if participants can not

finish all the topics in three interview sessions, a follow-up interview will be arranged according to participants' agreement on time and date. Date, time and location of interview will be decided by participants. All interviews will be recorded by recorder.

A copy of interview topics and questions will be sent to participants with this consent form, so that participants have a better understanding of what they will be asked during interviews.

If any follow-up study is needed, participants will be contacted by phone or emails. Participation in the follow up is completely voluntary for all participants.

All the participants join the interview voluntarily. During interviews they have the right to refuse answering any of the questions. They can stop participating in the study anytime with no concern. All information collected will be destroyed.

● **What Type of Personal Information Will Be Collected?**

If the participants agreed to attend the interview, demographic information about their age, gender, profession, number of children will be collected.

Only the researcher has access to the audiotape of interviews, the audiotape will only be used for this research, otherwise it will be kept confidential

There are several options for you to consider if you decide to take part in this research.

You can choose all, some, or none of them. Please review each of these options and choose Yes or No:

I grant permission to be audio taped:

Yes: ___ No: ___

You can use my personal stories in the research paper: Yes: ___ No: ___

I wish to remain anonymous, but you may refer to me by a pseudonym: Yes: ___ No: ___

The pseudonym I choose for myself is: _____

You may quote me Yes: ___ No: ___

● **Are there Risks or Benefits if I Participate?**

No participants' real names and companies' names will be revealed in the research study, the study won't harm participants' and their family members' benefit and life.

Participants will not be paid to attend interviews, nor will the interview cost them any money.

● **What Happens to the Information I Provide?**

Only the researcher has the access to information collected.

Participants' names and companies they worked for will be anonymous for presentation of the research results, which will be replaced by Capital letter of A, B, C...

The audio recorded files will be kept in the folder which is encrypted in researcher's computer. Other hardcopies of field notes are kept in a locked cabinet only accessible by the researcher and her supervisor. The anonymous data will be stored for five years on a computer disk, at which time, it will be permanently erased.

● **Signatures**

Your signature on this form indicates that 1) you understand to your satisfaction the information provided to you about your participation in this research project, and 2) you agree to participate in the research project.

In no way does this waive your legal rights nor release the investigators, sponsors, or involved institutions from their legal and professional responsibilities. You are free to withdraw from this research project at any time. You should feel free to ask for clarification or new information throughout your participation.

Participant's Name: (please print) _____

Participant's Signature: _____ Date: _____

Researcher's Name: (please print) _____

Researcher's Signature: _____ Date: _____

● **Questions/Concerns**

If you have any further questions or want clarification regarding this research and/or your participation, please contact:

Miss Wei SHAN,

Werklund School of Education

Mobile: +1(587)228-3826, email:nerissa.shan@gmail.com

*and Dr. Shibao, Guo, Werklund School of Education telephone:+1(403)220-8275, and
email shibao.guo@ucalgary.ca*

If you have any concerns about the way you've been treated as a participant, please contact an Ethics Resource Officer, Research Services Office, University of Calgary at (403) 220-3782; email cfreb@ucalgary.ca.

You can also contact Ms. Li Huirong who will be your representatives for any ethic issue arises during interview process, at: mobile: 86-13699111876,
email:arsenaler@hotmail.com

A copy of this consent form has been given to you to keep for your records and reference.

The investigator has kept a copy of the consent form.

APPENDIX D: CONSENT FORM (CHINESE)



研究者姓名, 科系, 部门, 电话 & 邮件:

单薇, Werklund 教育学院, 成人教育专业, 移动电话: 1-(587)-228-3826 (加拿大), 邮件地址: nerissa.shan@gmail.com

导师:

郭世宝, 博士, 副教授

研究项目名称:

活到老, 学到老: 当代中国退休老人终身学习之路

赞助人:

无

该同意书仅包括有关你同意作为被访者参加该研究课题的部分内容。如果你需要更加详细的相关说明或信息, 请随时告知。请您仔细阅读该文件并理解所述及的所有信息。

卡尔加里大学及其研究伦理委员会已经批准了该项研究

课题研究目的

衰老不单单是一个生理和心理衰退的过程, 它还涉及到文化, 经济和政治的因素。那就是越来越多的退休老人意识到学习的重要性。该研究课题的主要目的是试图揭示终身学习在退休老人顺利的过渡到退休生活中, 达到身心健康, 重新建立自信, 改变对退休生活的态度, 从而达成健康老龄化, 这一过程中所起到的作用和所扮演的角色。其中着重了解中国退休老人对健康老龄化的看法, 现有可供老年人选择的终身学习课程, 以及退休老人对这些课程的意见与建议。以及终身学习是如何帮助

中国的退休老人达成健康老龄化并且成为积极向上，具有影响力的公民。

我需要做什么？

每个受访者将受访3次。访问的主要目的是要讲述自己的学习经历和体验。在访问过程中受访者要对一些话题给出自己的见解。每次采访要持续1.5个小时。如果三次访问不能完成所有话题的讨论，还会追加一个后续采访。所有采访的日期，时间，地点由受访者决定。

所有的采访都将被录音。

采访时需要讨论的话题将和此同意书一起发给参加此次研究访谈的参与者。

如果此次研究在采访结束后，还需要进行一些后续的信息确认的环节，研究人将通过电话或者邮件联系受访者。对本次研究课题的参与完全基于自愿的基础上。

所有受访者都有权拒绝回答任何不愿回答的问题，也有权在访问期间决定退出此次课题研究。如果受访者决定退出，所有之前收集的关于受访者的信息都将被销毁。

哪些个人信息将被收集？

如果同意参加本次研究，受访者将被问及以下信息：年龄，性别，职业，子女

只有研究者本人可以听到采访录音，所有收集到的信息都将被保密。

如果你自愿参加本次研究，你可以有以下多种选择。你可以选择全部或者其中一种，或者不选择，请你在愿意的选项上打钩：

我同意被录音: 是: ___ 否: ___

在你的研究中可以讲述我的个人生活故事: 是: ___ 否: ___

我希望匿名，但是你可以用我的笔名: 是: ___ 否: ___

我给我自己选的笔名是: _____

你可以引用我说的话 是: ___ 否: ___

如果我参加此次研究会不会有一些风险或者利益?

在研究中不会用到受访者的真名，受访者和其家属的生活不会受到影响。

受访者没有任何可预见的风险，同时也不会从中获得任何利益。

我所提供的信息将被如何处理?

除了研究者本人，没有人可以接触到任何关于受访者的信息。

在最终的报告里，受访者的姓名，供职单位将使用匿名

受访者的录音信息将被保存在研究者的电脑里，并在文件上加密。其他相关的文件信息将被所在保险柜里，只有研究者本人有电脑和保险柜的密码。录音材料将在电脑里保存五年，之后将被永久性删除

签名

你在此文件上的签名说明：1) 你完全明白上面提供的有关你参加此项研究的信息，2) 你同意作为一个受访者参加此项研究。

你不会为此而丧失你的合法权利，研究者，研究资助者或相关单位也不会因此而免除其法律职责。你可以随时撤出研究。你可以随时在访谈的过程中就任何问题要求研究者提供一些新的信息或者进行进一步说明。

参加者姓名: (请打印) _____

参加者签名: _____ 日期: _____

研究者姓名: (请打印) 单薇 _____

研究者签名: _____ 日期: _____

其他问题

如果你对此项研究还有任何问题，或者对此项研究还想进行进一步了解，请联系:

单薇 (研究者)

Werklund 教育学院

移动电话: +1(587)228-3826, 邮件: nerissa.shan@gmail.com

和 郭世宝, 博士, Werklund 教育学院, 电话: +1(403)220-8275, 邮件
shibao.guo@ucalgary.ca

如果你想进一步了解作为受访者你将被如何对待, 请联系卡尔加里大学伦理资源部
研究服务办公室, 电话: 1-(403) 220-3782; 邮件 cfreb@ucalgary.ca.

在接受访问时, 如果您有任何关于涉及伦理方面的问题或者反馈, 请联系李慧蓉女
士, 她将是受访者的代言人, 你们的意见会通过她反馈给研究者。她的联系电话
是: 86-13699111876

邮件地址是: arsenaler@hotmail.com

该同意书一式两份, 分别由你和研究者保留, 以备参考。

APPENDIX E: INTERVIEW THEMES WITH GENERAL QUESTIONS (ENGLISH)

Topic 1. To find out participants' life experiences before retirement, challenges in retirement before participating in learning activities, and influence on family relationships.

1. Tell us about yourself as a retired lifelong learner.
2. In which year were you retired?
3. What was the reason for your retirement?
4. Before retirement, what was your profession?
5. What do you think was your greatest achievement in your career? Are you proud of your profession?
6. What is the greatest achievement in your life so far?
7. How did you when you know you are to be retired?
8. How did you deal with it (the feeling)?
9. When you actually stopped going to work, do you find big differences in your daily life? How did you feel about it?
10. Do you have kids? How many of them?
11. What's your expectations on your kids before and after your retirement? How do they react?

Topic 2. To present former and current education experiences, in order to find out Chinese older adults' preference on the type of learning, purpose of learning, and benefit of learning to their life. At the same time, to find out what's need to be improved.

12. Tell us about your education background. What is your experience of education? Has the culture revolution influenced your education experience?
13. Besides education at regular school age, have you attended any training or learning activities? And what are they?
14. Why do you choose this school?
15. What class (es) do you participate in now? Why do you choose this (these) class (es)?
16. How do you like the way the classes are delivered? Anything needs to be improved?
17. What else are you interested in learning? Are they available in this school or in any other schools for older adults?
18. What is that you appreciate the most in the learning activities?
19. Why do you want to keep learning?
20. How does learning activity help you cope with your feelings of retirement?

21. Are there any changes that you noticed in yourself or your children noticed in you after you start going to classes?
22. What are the benefits you get from learning activities that you involved in? (Physically? mentally? Family relationships? The way you see yourself? World view? Etc.)

Topic 3. Find out Chinese older adults' recognition of "successful aging" and "lifelong learning", their knowledge about citizens' rights, their view on the inequality on access to learning opportunities, social bias on older adults and how to break the bias. Also to reveal how do they make meaning of their retired life.

23. Have you heard of the term "lifelong learning" and "successful aging"? If yes, how?
24. Do you think the Chinese older adults are provided enough learning opportunity? What needs to be improved?
25. Do you realize that as a citizen of this country, learning is the human right that needs to be guaranteed no matter what age you are at? Why?
26. What is the public opinion and perspective on retired older adults? Do you think the opinion is fair? And how could older adults prove their worthiness to the society?
27. Have you ever seen any disabled people or people who have difficulties in mobility attending the classes? Do you know any organizations that provide learning opportunities to them?
28. What help do you think needs to be provided to people who have difficulties in mobility?
29. Now how do you see your retirement life? How do you see yourself?
30. Do you now have a different perspective about the meaning of your life?

APPENDIX F: INTERVIEW THEMES WITH GENERAL QUESTIONS (CHINESE)

主题 1. 了解受访者退休前的生活经历，退休后还没有参加任何学习活动时，在生活中所遇到的困难，以及当时的家庭关系。

1. 您今年多大年龄？
2. 兄弟姐妹？几个？
3. 您有几个孩子？孙子孙女？
4. 退休的时候是多大年龄啊？
5. 退休的原因是什么？（达到退休年龄？还是被要求退休？有返聘吗？）
6. 在退休前是做什么工作的？（具体讲讲工作内容，喜欢您的工作嘛？）
7. 当你知道你要退休的时候，心里是什么感觉？您是怎么面对要退休这件事的？有没有为退休后的生活做什么打算？
8. 当你完全从工作岗位退下来的时候，是马上就报名参加学习班了吗？
9. 如果没有马上参加任何学习班，那您每天在家都做什么呢？
10. 会不会有心理落差？呆在家里有什么样的感受？在你退休前，对子女的期望是怎样的？
11. 在退休后对子女的期望有改变吗？您的子女对您的改变有什么样的反应吗？
12. 退休以后有没有觉得身体不如以前好了？更需要子女的照顾了吗？

主题 2. 呈现以前和现在受教育的经历，以此来发现中国老年人偏爱的学习方式，学习的初衷还有学习如何使他们受益。同时还要找出有哪些地方需要改进。

13. 为什么这么爱学习？能讲讲您的学习经历吗？（小学？中学？大学？）是否受到文化大革命的影响？
14. 除了在上学年齡接受正规教育外，在工作的同时有没有机会参加一些培训？都有哪些培训？
15. 为什么选择在这所老年大学学习？
16. 你现在都参加哪些课程？为什么选择上这个课？
17. 老师是怎么教课的呢？你觉得有什么需要改进的地方吗？

18. 你还对学习什么课程比较感兴趣？在这所学校有这方面的课程吗？或者你知道其他学校有这方面的课程吗？
19. 参加这些学习活动对您来说最大的益处是什么呀？
20. 你为什么想继续学习？
21. 您觉得参加这个课，对改变您的心情，退休生活有什么帮助吗？
22. 在参加老年课程以后，你有没有发现自己有哪些变化？
23. 继续参加学习活动后，你在哪方面受益？（比如 身体方面？精神层面？家庭关系？你对自己的看法？你的世界观？人生观？等等）

主题 3.揭示中国老年人如何看待“健康老龄化”和“终身学习”这两个概念，和对于公民权利的认识，和老年人接受继续教育的机会是否均等的看法。还有如何看待社会对老年人的偏见，如何打破这种偏见。还希望揭示退休老人如何是他们的退休生活更有意义。

24. 你是否听说过“健康老龄化”这两个概念？是怎么知道的？
25. 您是怎么理解健康老龄化的？
26. 你觉得中国的老年人有足够的学习机会吗？哪方面还需要改进？
27. 您觉得为什么老年人也应该继续学习？继续接受教育？
28. 社会对退休老人是什么看法？你觉得这种看法公平吗？
29. 您每天的生活觉得很忙碌吗？为什么？是每天上课吗？不上课的时候，都做什么呢？大部分时间都用来做什么呢？
30. 你见过有残疾人或者出行不便的人来上课吗？你知道有哪些机构对这些人提供学习机会吗？
31. 你觉得对于出行困难的人应该提供哪些帮助？
32. 形容一下您现在的退休生活？对现在的这种退休生活您觉得满意吗？