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Transformation Toward What End?
Exploring Later Life Learning in Community Volunteering

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Abstract: A qualitative study of 15 older volunteers in Toronto details how informal learning takes place in community volunteering, and urges the expansion of the concept of later life education during an era of increasing longevity and languishing welfare support.

Introduction
The 1998 New Approaches to Lifelong Learning (NALL) survey of informal learning in Canada confirmed what Livingstone (1999) has termed the current “iceberg” situation of an immense yet largely invisible amount of self-directed adult learning in the informal domain. One of the four aspects of informal learning investigated in the survey was community volunteer work related, where it was found that over 40% of Canadians devoted approximately 4 hours week to informal learning through community volunteering. This reminds us that community volunteering is one of the hot spots in adult learning which should be more fully studied in the light of lifelong education. In this paper I examine what kinds of learning are experienced by older adults through their volunteer work, and if and how these affect aging at both the individual and the societal levels. I conducted qualitative research of 15 senior volunteers in Toronto. I employed life story interviews and participant observation, analyzing the data inductively through transformative learning theory and other theories of later life education. The following is a summary of the context, theoretical framework, research design, and findings of my study, followed by a discussion of its implications for adult education theory and future practice.

Context: Why Does It Matter?
Studying community volunteering in the light of later life learning is of special importance today when the combination of an aging population and a fraying social safety net challenges the ingenuity of many industrialized societies. Although this demographic shift is raising concern, it would be a mistake to characterize all seniors as “dependent”, neglecting the “structural lag” which limits opportunities to utilize and reward the contributions of older people (Riley & Riley, 1989). In current North American popular culture, ageism marginalizes older adults as incompetent: what Miller (Toronto Star, 1999) terms “the Grandpa Simpson syndrome,” where older people are portrayed, like the cartoon character, as incontinent and liable to walk into walls in their old folk’s homes. “Old age”, after all, is a social construct based on cultural perceptions of “older people’s value”, which needs to be reconstructed depending on social conditions. Given the increasing number of younger and healthier retirees today, it is important that we promote the idea of “productive aging” (Butler, 1985). Volunteering is a key element in this endeavor.

Canada’s fraying social safety net has also added to community volunteering’s importance. As the welfare state is replaced by leaner governments, more privatization, and an emphasis on self-sufficiency, we turn to third sector NPOs to fill the gaps in community social services. Due to its non-monetized status, volunteer work tends to be invisible, but in 1997 its time contribution was estimated to equal 578,000 full-time year-round jobs in Canada (Statistics Canada, 1998). As Quarter (1992) has emphasized, volunteer work is a vital part of Canada’s “social economy”. As the voluntary sector is also facing serious reductions in funding, the need for relying on volunteers will grow continuously. This in turn invites us to consider the potential of older people as an untapped community resource.

Theoretical Framework: Transformative Learning and Older Adult Education
To frame my analysis, I employed transformative learning theory as a major theoretical perspective in tandem with other theories regarding later life education. The theory of transformative learning, originally introduced by Mezirow (1991, 1994), has
generated many intriguing interpretations in the field of adult education. Nevertheless, it has never been directly applied to the study of aging. Its core can be found in our meaning structures— the broad set of psychocultural assumptions that frame our world view. The constant revision of these meaning structures through experience and learning can lead us toward more liberated viewpoint, the process Mezirow (1994) identified as adult development.

Mezirow’s theory has been built upon by many other researchers. Taylor (1997), based on an extensive review of empirical studies, suggested that it should be reconceptualized within a more holistic and contextually-grounded framework (i.e. one which pays more attention to the role of emotions, alternate ways of knowing besides rational thinking, collaborative and supportive relationships with others, and compassion). Transformative learning can not only promote individual autonomy, it can also build interdependence and connections, empowering adults to take collective action in their own communities to reform social practices.

The strengths of transformative theory derive from its unconventional view of adult development as learning process. Most stage or phase models of adult development tend to incorporate hegemonic and age-graded stereotypes, basically viewing individuals as mere reactors to normative life-cycle changes. In contrast, transformative learning theory, by being “directed at the intersection of the individual and social” (Tennant, 1993, p.36), has the capacity to articulate the dynamic interplay between individual and social transformation, allowing researchers to analyze social structures through the experience and reflection of each individual.

Theories of later life education also help us understand the nature and extent of older adults’ informal learning within community volunteering. For example, the five categories of older adults’ educational needs (coping, expressive, contribution, influence, and transcendence) identified by McClusky (1971) call for a reformulation which includes the process and outcomes of later life learning. Moody (1988) moved in this direction, summarizing the expansion of older adult education over the last forty years in the U.S., and identifying the four historical stages of: 1) “rejection”, which deems it a waste of time and money to provide educational programs for socially obsolete older people, 2) “social service”, which regards education as a way to keep the elderly busy, 3) “participation”, which maintains that older adults should be encouraged to actively participate in the mainstream of community life and develop self-sufficiency, and 4) “self-actualization”, which identifies psychological growth and spiritual concerns as the major objectives of education for older adults. Moody’s four stages reflect the changing underlying assumptions about the value of education for older people held by adult educators and society in general.

Research Design: Methodology and Mode of Data Collection and Analysis

I employed a qualitative approach “life history” research method with interviews and participant observations. Face-to-face interviews were conducted with 15 older volunteers, nine women and six men, who are retired and affiliated with NPOs in Toronto, followed by participant observation at their volunteer sites. Although participants were basically recruited by word-of-mouth, effort was made to diversify my sample. Their ages ranged from 54 to 94. Except for two female participants who had been full-time homemakers, all the participants had had occupations: sales clerk, social worker, civil servant, teacher, corporate executive, to give a few examples. The type of NPOs for which they worked also varied: health care, animal protection, education, social services for the elderly, international development, human rights, advocacy, etc.. All but two had volunteered for more than one year, and some had long histories of volunteering for a number of different NPOs. All were Canadians whose first language is English, though they had different ethnic backgrounds. Each interview was approximately an hour to an hour-and-a-half long, tape-recorded and subsequently transcribed. I began each interview by asking participants to tell me all about their volunteer experiences. If there were any points which I wanted to know in more detail I asked them at the end. Data collected through participant observation was used for the purpose of “triangulation”. The data analysis followed Seidman’s (1991) two-step scheme; the first step crafting a profile of individual participants; the second analyzing the data according to themes and categories with coding and sorting.

Findings

Each participant’s narrative embodied their “life world”—their values, life principles, joys, hopes, sorrows, agonies, fears, etc.—powerfully conveying
how much an activity like community volunteering involves the whole person. In spite of their significantly different life experiences, ages, living circumstances, and the content and frequency of their volunteering, several overarching themes emerged from a comparison of their cases.

**Motivations**

All the participants pointed out multiple motivations for their involvement in volunteering, which could be divided into two major domains: social and personal. The former includes 1) social obligation—“pay-back time” was the term often used— for their community; and 2) altruism and compassion, which many modestly phrased in terms of “wanting to help people in need out there”. The personal domain of motivation comprised 1) managing increased free time—although this doesn’t mean volunteering to kill time since many have active social lives; 2) social contribution—most mentioned that they want to keep contributing to society, which is the other side of their desire to “feel useful and recognized”; 3) pursuit of interests and principles or religious beliefs, evidenced by the fact that many chose NPOs whose goals match their own; 4) social interaction—they want to stay active, interacting with people and being involved in on-going social issues; 5) personal growth—they want to keep learning out of intellectual curiosity and for self-development. Overall, personal motivations were articulated more clearly and strongly than social motivations, although the latter seemed to outweigh the former as people grew older. In particular, the last motivation, self-growth, was emphasized regardless of age.

There was a difference in the motives that propelled people to continue volunteering from those that led them to start it. Except for two participants who had began volunteering less than one year ago, most older volunteers had the experience of quitting a volunteer post in the past. Their main reasons for changing organizations were 1) being misused (either overused or underused) by an unappreciative NPO; and 2) being involved with ill-organized programs which they didn’t feel were making any difference. For volunteers in a big city like Toronto, shopping around among NPOs to find the “right match” seemed very common. The reasons for continuing volunteering were summed up by the word “rewarding”.

**Rewards for Volunteering**

The first reward all participants mentioned was the satisfaction and self-esteem they gained, although the sources of satisfaction didn’t always connect directly to the content of their work. The terms used were rather abstract: 1) the sense of contribution and making difference; 2) the sense of being appreciated, needed, and recognized; 3) the sense of accomplishment; 4) the joy and stimulation of socializing with other people. Volunteering seemed to provide the confidence that one was healthy and capable of solving problems that arose in the course of one’s work. In particular, the meaning of volunteering as a source of well-being seems to increase as other social functions and sources of joy like spouses, families, close friends, and hobbies, disappear with age. The second reward mentioned by many older volunteers was that volunteering keeps them physically and mentally active, getting them out of the house and moving around and keeping their brain alert. The third reward from community volunteering was that it involves one in an on-going community or world-wide movement, providing a sense of connection to, borrowing one participant’s word, the “mainstream of society”, while allowing retirees to throw their knowledge, skills, life experiences and interests behind favorable social causes. For old-old volunteers, in particular, the feeling of making society a better place within a larger movement “beyond oneself” seems to provide meaning in their life, and possibly even a sense of spiritual immortality. Finally, the fourth reward mentioned by all participants was the opportunity for continued learning.

**Learning**

The types of learning that emerged in volunteers’ narratives included both communicative competence and instrumental knowledge. In particular, interpersonal and communication skills (i.e. “how to work with others to achieve a common goal”) and specific knowledge about social issues of interest (e.g. governments’ welfare policies, human rights, elder abuse, literacy among immigrant children, computer skills, economic conditions of developing countries, biology, botany, condominium act, foreign languages, etc.) were discussed by almost everyone. “Administrative” volunteers involved in policy-making as board or committee members mentioned that they learned leadership (i.e. “how to be influential and persuasive”) trying
to negotiate the tricky power relationship between NPO volunteers and staff. Overall, younger seniors seemed to appreciate the explicit and practical instrumental knowledge gained through volunteering more, while older and long-term volunteers emphasized implicit and tacit interpersonal skills. The other important component which emerged from all participants’ narratives was that volunteering helped them understand themselves better through questioning who they were, what they wanted to do and be, what they really cared about, etc.

The process of learning took place through 1) formal training and educational opportunities provided by NPOs; 2) self-directed study (e.g. taking courses or reading books on related issues), and 3) problem-solving and communication with others at volunteer sites. The first two can be identified with instrumental learning. Yet, in the first case, except for a few NPOs which offered well-organized pre-training followed by occasional educational opportunities such as inviting guest speakers, most NPOs had almost no funding left for volunteers’ education. The most commonly used learning approach among participants was the third, which is more experiential and holistic. Most participants pointed out that the challenge and frustration of volunteering often involved differences of opinion with staff and other volunteers working on the same project. However, at the same time, these difficulties seemed to help facilitate older volunteers’ communicative learning, improving their ability to listen to and understand others and modify themselves.

The outcome of learning through volunteering was perceived in terms of behavioral and perspective change, although many emphasized that this had not happened in one night. Words like “more patient”, “more lenient”, “more open” to other people, and cultural heterogeneity were used to articulate what was perceived as a part of their personal growth. As well, most mentioned that they had gained more self-assurance. As for new insights about society, participants mentioned their realization of the vital role played by volunteers and the growing need for social services in their community. Appreciation from service receivers had also made them “more committed” to volunteer work, while unappreciative and inefficient volunteer managers were roundly criticized.

**Discussion**

My findings suggest that older volunteers undergo a variety of informal learning activities, encompassing the four categories of volunteer work-related informal learning outlined by the 1998 NALL survey: 1) communication skills; 2) knowledge about social issues; 3) organizational/managerial skills; and 4) interpersonal skills (Livingstone, 1999, p.61). They can also be identified with the third (“participation”) and fourth (“self-actualization”) stages of Moody’s (1988) theory of the expansion of later life education.

The multiple motivations and rewards of community volunteering that older volunteers mention can be further connected to McClusky’s (1971) list of older adults’ educational needs: coping, expressive, contribution, influence, and transcendence. The life histories of older volunteers reveal that volunteering functions as a coping strategy when they face difficult life changes (e.g. retirement, the death of family members, deteriorating health due to aging), sustaining continuity in their life, giving them an agenda and purpose, and keeping them busy on a day-to-day basis. Volunteering meets these needs by providing opportunities to get involved in community reform, while stimulating intellectual curiosity and provoking critical reflection about social issues, people, and cultures. The heightened self-esteem and satisfaction gained from serving worthy causes energizes older people while enhancing their commitment to collective needs. Furthermore, volunteering offers a supportive setting for life review: while solving problems through interaction with others and gaining new information, older adults constantly examine themselves and others in order to “establish the validity, or justification, for their beliefs” – what Mezirow (1994, p.225) characterized as the goal of communicative learning.

This type of learning seems to promote individual autonomy, fostering “cultural generativity”, “ego-integrity” and “transcendence”, i.e. those higher developmental tasks of adult development advanced by Erikson et al. (1986), Kotre (1984), and Friedan (1993) as well as “the progressive realization of an adult’s capacity to fully and freely participate in rational dialogue, to achieve a broader, more discriminating, permeable and integrative understanding of his/her experience as a guide to action”, using Mezirow’s (1994, p.226) words. Although the activities (organizing volunteers to run fundraising and recreational programs for elderly, reading books together with school
children, informing students about human rights and natural conservation, driving the Meals on Wheels truck, traveling to help economic projects in developing countries, etc.) may seem small, perhaps even invisible, they impact on society when they work in concert, a pattern one participant described as a “jigsaw puzzle”. Most older volunteers developed a better realization of the importance of “collaboration” to achieve goals and “interdependency” to support self-sufficiency, consistent with the outcomes of transformative learning (Taylor, 1997).

Whether or not this personal transformation leads to political action – like advocacy or governmental lobbying – largely depends on things like personality and the environment of a given NPO. Yet, the volunteering movement itself is a collective social action. By volunteering in a certain organization, one has already taken the first step. Of course, not everybody starts out with developed political insights--veteran volunteers’ stories show this kind of perspective tends to be cultivated and enhanced as one continues volunteering. Such “emancipatory” change at the individual level may, though what one participant described as “baby steps”, push our society in a more inclusive less age-graded direction, and force policies which provide older adults with more choices in later life.

Conclusions and Implications for Adult Education Theory and Practice

It is not my intention to generalize the results of my study, given the small number of participants and the qualitative nature of my inquiry. Nevertheless, the narratives of my 15 older volunteers remind us that learning is a lifelong process and the desire for spiritual growth continues regardless of age. If the proper environment and conditions are provided by NPOs, older volunteers can continue to learn and grow while contributing their skills and wisdom to society. Their frequent anecdotes about the negative side of volunteering in NPOs indicates that greater organizational investment is needed to develop programs which allow older volunteers to be involved in the decision-making process. After all, volunteers are the ones who have direct contact with clients and thus pick up their needs faster and better than administrative staff do. As well, since younger seniors tend to lay more stress on instrumental knowledge in community volunteering, NPOs should try to include more educational materials to benefit their volunteers. Establishing new partnerships between NPOs and other existing adults education programs (e.g. lifelong education courses at colleges and community centers, pre-retirement programs in corporations) should also be considered.

As we move into a society where seniors are no longer the “exception”, lifelong learning will become significant more than ever. The challenge for the adult educator is to reconsider the meaning of later life development and learning at both the personal and social levels, and encourage those types of learning whose outcomes will meet the needs of older adults as well as society at large. Although creative programs for later life learning (e.g. Elderhostel, University of The Third Age, New Horizons, etc.) have been increasing in Canada, the general trend of educational programs for older adults has often held the principle of “keeping them busy, keeping them from mischief” (Thomas, 1992). Given the simultaneous growth in the number of active retirees and the gap between government funding and social service needs, the concept of later life education should be expanded “beyond the classroom”. This will make the relationships between knowledge and action, as well as individuals and communities, more implicit, and fortify the liaison between individual development and social transformation.

References