ATHABASCA UNIVERSITY

WEB OF WISCOM:

AN ETHNOGRAPHIC CASE STUDY OF OLDER ADULT LEARNERS ONLINE

LYNN A. FARQUHAR

A DISSERTATION

SUBMITTED TO THE FACULTY OF GRADUATE STUDIES

IN PARTIAL FULFILLMENT OF THE REQUIREMENTS FOR THE DEGREE OF

DOCTOR OF EDUCATION IN DISTANCE EDUCATION

THE FACULTY OF HUMANITIES AND SOCIAL SCIENCES

ATHABASCA, ALBERTA

OCTOBER, 2019

Acknowledgements

I started this research because I am an optimistic fool. I underestimated the time I would need to finish, and I overestimated how much personal sagacity I could obtain by reading books about the wise. Despite my many hopeful overtures, wisdom eluded me throughout this process. To some extent, I feel like a spurned suitor. Nevertheless, writing this dissertation has taught me a precious life lesson that the wise must surely understand: always multiply by two when calculating the demands of a project.

There were others involved with the completion of this venture who have courted wisdom more successfully than I. Without them, I would still be sitting in a library, sighing and casting longing glances at the dissertations of others. Many thanks to Dr. Dianne Conrad for taking on the task of supervision. Her knowledge of online education, talent as a writing mentor, and skill as an editor were invaluable. Further thanks must be extended to Dr. Cynthia Blodgett-Griffin, who, beyond the trudge of helping me to develop an acceptable research proposal, was generous with her time and unparalleled in her encouragement throughout. Dr. Walter Archer and Dr. Bob Heller were both exhaustive yet gentle in their suggestions for revision. I thank them for their vital assistance in improving the final draft.

I must also thank my husband, Terry Kirby, and my children, Annie de Grey and Elliot de Grey, who offered me time, space, moral support, and buckets of hot chocolate. Similarly, I am grateful to the other students in Cohort 5 at Athabasca University for their companionship throughout this long journey. Finally, I extend many virtual belly rubs of appreciation to Rudi, the family dog. She lay on the floor beside me as I wrote, listening to my complaints and providing silent camaraderie. In the final analysis, I believe that her peaceful acceptance of life's challenges has taught me nearly everything I need to know about wisdom.

Abstract

This differentiated replication examined the WisCom instructional design model when used in an online course for persons over 55 years of age. In total, 23 older adult men and women participated in a non-formal course that ran twice within two consecutive six-week semesters. I describe several key findings of this ethnographic case study. First, the older adult participants were ill prepared for a course with a constructivist ethos. As a result, course forum participation was low. Group collaboration and knowledge building was evident only during case studies. Second, the participants identified good listening skills, experience, and a reflective nature as the three most prevalent characteristics of those who are wise. Listening skills were in evidence among many participants; they seemed to have anticipated a course where they would simply apprehend an abundance of direct instruction. Third, the forum comments of the first cohort of participants was made available to the cohort that followed. This appeared to have had a positive effect upon the second cohort of participants, who were able to access the previous store of knowledge. Fourth, there was no evidence of transformative learning among participants who took this course. This was contrary to the previously reported results by the WisCom developers. Among conclusions is that evidence of perspective transformation may have been misapplied to ordinary instances of learning in earlier uses of WisCom.

Keywords: Distance education, online learning, educational gerontology, wisdom, perspective transformation, transformative learning, late-life learning, older adult learning, WisCom, Community of Inquiry, ageism, non-formal learning, Erikson, Mezirow, Berlin Wisdom Paradigm.

Table of Contents

List of Tables

List of Figures

Chapter 1. Introduction

The virtual-ethnographic case study discussed in this paper explored the meaning and role of wisdom as it was experienced in a community of older adult participants while they studied online using the *WisCom* instructional design model (Gunawardena, Ortegano-Layne, Frechette, Carabajal, Lindemann, & Jennings, 2006; Gunawardena, Frechette, & Layne, 2019). An online course at a University of the Third Age (U3A) was the site of the study. As the participants collaborated through a discussion forum in a learning management system (LMS), they defined and described their experience of wisdom, as well as their perceptions relating to explicit and implicit theories on the matter. Mezirow's (1978b, 1991) depiction of perspective transformation within the vehicle of transformative learning and Erikson's (1993) stage theory of life-course development have been referred to for theoretical guidance. By conducting research that rejects the stereotype of older adults as technophobes, I have developed an open-minded and progressive profile of this demographic.

Throughout this document, I will use the terms elders, older adults, retirees, and seniors to signify those over age 55 who have retired from employment. I chose the age 55 to demarcate the point of older adult learning because this is the age when students are accepted into most U3A programs. Nevertheless, available statistics from U3As indicate that the average age of participant in these programs is between 65 and 75 (Beckett & Jones, 2011, 2014; Hebestreit, 2008; Heitaluoma, 2008; Janiero & Jacob, 2014; National Office of Statistics, 2009). The group that I studied held an average age of 76.

The study discussed in this document examined members of one U3A group that exclusively uses online learning. The participants were engaged in an asynchronous, non-formal, online course on the topic of wisdom. WisCom (Gunawardena et al., 2006, 2019) is the instructional design model I used to develop the course. WisCom purports to promote transformative learning and wisdom development in online learning communities; hence, it appeared to be an ideal, if under-tested, model. The experience known as perspective transformation is an element of transformative learning, which Mezirow introduced (1978a). The new perspective that one assumes denotes an enhanced critical awareness of assumptions. Previously unexplored behaviours and ways of discerning are tried and either accepted or discarded. The developers of WisCom surmised that if an older adult were to experience a perspective transformation, wisdom development might result. Such an outcome has been postulated by Ardelt (2000b), Bassett (2005, 2006), Cox (1999), and Gunawardena et al. (2004, 2006). Cox (1999) is an important influence in the development of WisCom, as she proposed the development of transformative learning and wisdom through online learning.

Purpose and Research Question

Throughout this study, I sought to discover whether wisdom could be fostered through the deliberate use of an online curriculum model intended to provoke meaning-making and perspective transformation. Gunawardena et al. (2006) have professed that this cause-and-effect relationship exists when one uses the WisCom model for courses with adult learners. However, at the time of this study's inception, WisCom's only reported use beyond the initial investigational course had been by the model's developers. These uses were (a) among U.S. and Venezuelan graduate students, and (b)

in an online professional development program for university faculty in Sri Lanka (Gunawardena, 2013). In the study discussed in this document, the population taking a course built on the WisCom model was a group of retirees. I sought information about how these older adult participants made meaning collaboratively in an instructional design environment purported to foster a wisdom community. As recommended by Gunawardena et al. (2006), I studied a population different from those in the original use of the model. I sought indications of transformative learning and attendant wisdom gains. In so doing, I tested the suppleness of WisCom.

Beyond the limited testing of WisCom, another matter that drove this study relates to the lack of literature concerning the older adult learner as a student in online learning. The scant understanding of how older adults experience online education was considered both a gap in the literature and evidence of ageism. I do not present the information collected through this ethnographic case as a solution to a problem; rather, it is understood as an effort to inspire dialogue and to recognize this significant yet overlooked population.

Following are the research question and sub-questions.

- What happens in a discourse-based, online course created with the aim of developing a wisdom community for older-adult learners?
- Sub-question 1: Gunawardena et al. (2006) proposed that mentors support learning in the WisCom model of instructional design. What is the observed impact and function of mentors in this online community of learners?

- Sub-question 2: What evidence is there of transformative learning in this online community of older adult learners using Mezirow's (1978a, 1991) definition and description of the phenomenon?
- Sub-question 3: In what manner does the "cycle of inquiry" (Gunawardena et al., 2006) in the WisCom model of instructional design appear to affect this online learning community?

Background, Rationale, and Significance of the Study

This study was important for a number of reasons. In part, the objective was to develop a profile of today's older adult learner in Western society. To ensure that learning is accessible to traditionally underrepresented students, the study promotes an appreciation of the experience of online education among the members of this group. This study anticipated that longer lifespans in the coming years would bring about an increased interest in late-life education. Not only is this education for filling time, but also (and of greater interest) this is in aid of what O'Reilly and Caro (1994) referred to as *productive aging*. This term is believed to be the precursor to the contested notion of successful aging (Murphy, 2011), which is discussed later in this document. Unlike successful aging, productive aging does not propose a normative range of health and functioning. Rather, it maintains the view that older adults benefit from engagement in society. They maintain this engagement through activities such as work, volunteering, self-care, caregiving, and continuing education (Murphy, 2011). For the purposes of this research, productive aging is understood to denote the older person's potential for making valuable contributions to society.

Beyond the aim of understanding a demographic group that would benefit from greater social empowerment, I pursued this research in the interest of broadening the discussion on wisdom. As life expectancy increases and the Internet closes global distance, the opportunity exists to examine wisdom, which both Eastern and Western cultures consider the highest form of human understanding. Online learning has amplified and accelerated this enduring conversation. Nowadays, the dialogue occurs internationally, multi-vocally, and instantaneously. Significant to this study, wisdom was examined from the perspective of those who have lived long. I considered their reflections on experience and opinions about matters pertaining to wisdom development to be important and unique enough to merit attention.

Rationale

Several discrete rationales were behind my approach to this study. The first relates to the contextual aspect of the research, which concerns the scarcity of online courses specifically for communities of older adult students in Canada. Why this should be the case is puzzling, given the uptick in online learning. In 2017, the Canadian Virtual University (CVU) – a consortium of eleven universities in Canada that collaborate to provide online education – reported that registrations in courses leading to degrees exceeded 246,000. That year, the eleven universities involved offered over 400 programs and 2,000 online undergraduate courses. Beyond CVU, there are non-formal online courses available to the general public of adults. MOOCs as well as smaller, limited-registration courses can be found on sites such as LinkedIn Learning, Udemy, Coursera, EdX, and FutureLearn, to name a few of the more popular providers. To enumerate all the non-formal online courses available to Canadians alone would be an enormous and

ultimately inaccurate undertaking. Given the considerable market for online learning, it is troubling that organized institutes of learning for older adult learners such as the U3A are largely failing to offer their students this option.

The second rationale for this study relates to the instructional design aspect of this research. In 2006, Gunawardena et al. recommended that different learning contexts and diverse learners should try the WisCom model. The present study, conducted in a non-formal course with older adult participants, intended to test the suppleness of WisCom. I gathered information that could be useful to those who hope to develop constructivist-learning environments online. According to Gunawardena et al., (2006) WisCom inspires learners to become reflective thinkers who engage in the construction of knowledge. WisCom encourages them to develop collaborative skills that "transcend a disciplinary context" (Gunawardena et al., 2006, p. 230). The WisCom instructional design model intends to serve as a place where meaning is negotiated, where group knowledge is locally archived, and where wisdom development is, at least in part, the result of collaborative effort.

The third rationale for this study relates to wisdom development as the result of adult education. An ethnographic case study approach had not previously been used to examine wisdom and its possible relationship to Mezirow's (1978a, 1991) theory of transformative learning. This approach was anticipated to uncover nuances regarding wisdom development that had been overlooked. Driving this study was the conviction that wisdom is more than a freak quality enjoyed by the lucky few. Rather, wisdom was understood as a capacity that can be developed even at the latest stages of life through education that encourages what Mezirow (2003) referred to as critical-dialectical

discourse. It also proceeded under the auspices of two postulations drawn from literature on previous uses of WisCom (Gunawardena et al., 2006). These were (a) online learning based on the WisCom instructional design model can trigger perspective transformation, and (b) evidence of transformative learning can serve as a bellwether of wisdom acquisition.

Personal Significance

It is difficult to do justice to the personal significance of this study without first providing a brief chronology of how I came to the point of choosing my focus, my population, and my theoretical framework. For the sake of adding insight into how I arrived at my rationale, I will relate exactly what happened. While studying for my Master of Education degree, I took a course called Developmental Psychology in Education. Simultaneously, I had been doing some casual reading about wisdom development. To be honest, I fail to recall how I managed to do any casual reading during that period. Beyond my graduate studies, I was working full-time and teaching a college class in the evenings. Memories from that stretch in my life are blurred. However, through my casual reading, I began to notice many parallels between contemporary descriptions of wisdom and Mezirow's (1978a) transformative learning theory, which I had studied while doing my Bachelor of Education degree. I was intrigued. This interest accelerated when my psychology course introduced Erikson's epigenetic scheme of life-course development. Erikson postulated that the older adult – those over age 65 – face a crisis of ego-integrity versus despair during the eighth stage of psychosocial development. If the individual negotiates this crisis successfully, they emerge with the adaptive strength of wisdom.

After I entered my doctoral studies, I came across a description of the WisCom instructional design model, which Gunawardena et al. (2006) had developed as a means of fostering both transformative learning and wisdom in online learning. I was enormously excited to find that others had seen parallels between transformative learning and wisdom. With the intention of using this model for my dissertation, I began to consider my possible site of research and population.

As an older adult learner, I am intrigued when ageist assumptions inform perceptions of my ongoing education and my ability to integrate new information. Many have expressed this to me. When I first returned to formal education on a part-time basis in my early 40s, I found myself surrounded by several age peers as well as younger, more traditional students. A classmate in his mid-20s expressed astonishment that people so "elderly" would care to increase their education. Much to my ire, and to that of my peers, he informed us our interest in continuing our education was "cute." I first recognized derogatory ageist assumptions concerning older adults through my classmate's comfort in making this statement and through the complacent silence of his own age peers in the room.

When I began graduate studies – again on a part-time basis – I initially faced dissuasion from those who appeared to believe that my educational pursuits would distract me from duties as a wife and mother. This was particularly surprising, as my enhanced education was having a profound effect on my professional life. Not only had I found a much better job, but also my salary and working conditions had improved substantially. Clearly, both ageist and sexist assumptions regarding my proper role in society were affecting how my success was perceived.

As I continued to seek more challenging work opportunities, I was affronted by the number of hiring managers who overlooked the evidence of my skill, which was apparent on my CV. Rather than accepting that I was competent, I was repeatedly quizzed, with open skepticism, about my capacity to use even simple technology. Prospective employers seemed to assume that my age rendered me if not incapable, certainly limited in my understanding of computers and the Internet. This was bizarre. I had listed accomplishments on my CV, including the software and applications I could use. I had also highlighted my work as a university research assistant on a project that concerned online learning.

The decisive insult occurred when I was at an appointment with my physician. A young intern had joined her. When my physician briefly left the room to collect a requisition, the intern proceeded to speak in what I can only refer to as baby talk. She reassured me that although my physician was going to use “big, hard-to-say words,” I was not expected to remember any of them. Based solely on the criteria of my age and appearance, the intern had presumptuously chosen to infantilize me. When my physician returned to the room and asked how my doctoral studies were going, an expression of shock became frozen on the young intern’s face. My ability to learn and my desire to acquire an education later in life appeared to strike her as extraordinary, if not miraculous.

It was at that moment that I solidified my decision to use older adult learners as the population in my dissertation. From there, stoked with conviction, I began work on the research I describe in this document. My objective was not to disprove ageist prejudices regarding the older adult learner; rather, I wanted to study this group

regardless of prejudices that might prevent others from mounting a similar investigation. Therefore, I went into my research with the assumption that my participants were indeed capable of learning, interested in education, and competent with the technology they used for online learning. Putting older adult learners at the center of my interest in transformative learning and wisdom development is how I have shown them the respect they are so often and so casually denied.

Overview and Summary

This first chapter has described my research, which set out to explore the experience of older adult participants taking an online, asynchronous course using the WisCom (Gunawardena et al., 2006) instructional design model. The research plan was developed from the standpoint that there is merit in examining the role, if any, of wisdom development in the experiences of older adults, and that improving our understanding of this phenomenon holds value. By recognizing what the older adult brings to learning, especially in a digital environment, teachers will be better able to build programs for this special student group. Moreover, those teachers will be better prepared to facilitate learning that helps develop wisdom.

Chapter 2 proceeds with a review of literature directed by four themes*:* Wisdom, Perspective Transformation, Late-life Learning, and Instructional Design for Online Learning Communities. I will address intersections of theory and their relevance to this study's research questions, with attention to their application with the sample population.

Chapter 3 discusses in detail how this research partially replicated the WisCom model (Gunawardena et al., 2006) and how perspective transformation and the

development of wisdom in a U3A was studied. Explanation of the data-collection method – a case study using virtual-ethnography – will be provided.

Chapter 4 presents the data retrieved from my research, organized into five sections. I discuss the results of my study as they relate to WisCom and the cycle of inquiry, the implicit theories of wisdom development expressed by my participants, the differences between men and women in their conduct throughout the course, and the results of my post-course survey and interviews. Following this, in Chapter 5, I analyze my findings from Chapter 4.

Chapter 6 proceeds to provide my final observations and remarks. Ideas for future directions in research will be the final aspect of this dissertation.

Chapter 2. Literature Review

Throughout this chapter, I examine four conceptual themes. Intersections of significance to this study's research questions are noted. Wisdom, Perspective Transformation, Late-life Learning, and Instructional Design for Online Learning Communities appear as headings. Separately, these themes offer theories and perspectives of pertinence to late-life learning. When examined through the lens of anti-ageism, these themes provide complementary insights. The use of this lens encourages the reader to focus on the older adult as a relevant member of society – a notion that ageist assumptions blur. Furthermore, this lens filters out the decline narrative that habitually pathologizes old age (Birren & Woodruffe, 1973; Gullette, 1997).

Wisdom

Wisdom – if one accepts that it exists at all – is believed to be a desirable and quintessential human quality. Within the framework of the WisCom instructional design model, Gunawardena et al. (2006, 2019) postulate wisdom as predominantly a community attribute that promotes empathetic communication and humility among its members. Gunawardena et al. (2006, 2019) define wisdom from a sociocultural perspective, embracing a metaphor of "giftedness" as found in the Keresan Pueblo communities in New Mexico. This understanding of wisdom regards the wise as teachers who share their insights with the community.

Throughout history, wisdom has been associated with a diversity of attitudes, behaviours, systems, and creeds. Internationally, the quality of being wise is lauded as humankind's most highly desirable state. Philosophical, theological, psychological, and pragmatic approaches to wisdom development are evident in Western culture alone. In ancient Sumerian and Egyptian texts, the literature of wisdom is so comprehensive that

demarcating the limits of what should and should not be included is a challenge. Following Beaulieu (2007), wisdom literature is "largely an intuitive category, based on a general recognition of certain themes and questions" (p. 3).

The earliest recorded thoughts on the topic of wisdom are in *The Maxims of Ptahhotep,* an Egyptian text dated 3,600 B.C. (Fontaine, 1981). The narrator, Ptahhotep, gives instructions to his son, who is expected to inherit the official duties as vizier. The premise is that Ptahhotep is concerned that such a young man will lack the wisdom required of the role. Hence, he speaks aphorisms intended to hasten the son's development in this area. Among the directives are matters concerning effective communication, such as the importance of listening to others and speaking only when something worthwhile needs to be said (Simpson, 1986). The text also includes a variety of spiritual declarations concerning the benevolence of the gods toward those who act wisely. Assurance is given that the wise receive an earthly reward.

Offering substantial contrast is Sumerian wisdom literature dating back to 2,500 to 3,000 B.C. In ancient Sumer, the word *wisdom* is translated from cuneiform to mean "pure, sacred knowledge" (Clifford, 2007, p. 3). The notion of sanctity does not always correspond with contemporary understandings of this concept. The oldest surviving Sumerian text, *The Instructions of Shuruppak,* reveals a wisdom ideal that champions self-interest. On the surface, the format is similar to that of Egypt's *The Maxims of Ptahhotep*. Through pithy exhortations, the narrator, King Shuruppak, attempts to indoctrinate his son (Clifford, 2007; Lambert, 1960). Yet here the parallel ends. Unlike Ptahhoptep, Shuruppak appears to have a Machiavellian bent. He cautions his son to refuse occasions to vouch for another man, to treat debtors well for fear of retribution, to

refuse food to strangers, to never lay a quarrel to rest, and to avoid committing rape because it would ultimately give him a bad reputation (Clifford, 2007). Shuruppak further warns his son not to become involved in activities that might draw bad publicity or revenge. Comparing his utilitarian advice to that of the vizier Ptahhotep, in ancient Sumer (today's southern Iraq), being wise had more than one meaning; to some, it signified avoiding unwanted outcomes rather than acting with high moral and ethical intent.

That said, another influential piece of Sumerian literature, the *Epic of Gilgamesh* (2,000 B.C.), is certainly more palatable to contemporary readers in its concern for the commonweal. According to Beaulieu (2007), it "appears to represent the quintessential sapiential teaching" (p. 7). Thematically, the poem concerns itself with rejection of prideful activities, acceptance of mortality, and fatalism. The main character, Gilgamesh, only acquires wisdom when he abandons his persona as a warrior-hero and becomes a civic-minded ruler. In contrast to the *Instructions of Shuruppak,* the *Epic of Gilgamesh* serves as a cautionary tale about the perils of self-interest. As with contemporary Western society, where opinions on correct behaviour vary widely, it appears that ancient Sumerians did not agree about which actions and attributes were hallmarks of wisdom.

Extant texts from ancient Greece point to another society's disparate attitudes toward wisdom. The sophists, active during the 4th and 5th century B.C., were itinerant educators who taught rhetoric. They drew their name from the Greek word that denotes wisdom (*sophia*). Duke (n.d.), defending the sophists against charges that they were devious and morally suspect intellectuals, said, "the development of democracy made mastery of the spoken word not only a precondition of political success but also

indispensable as a form of self-defense in the event that one was subject to a lawsuit" (para 8). Nonetheless, Plato frequently made disparaging remarks against the sophists throughout his *Dialogues* (Cooper & Hutchinson, 1997). He appeared to disapprove of their overtly mercenary approach to philosophy and to the way they equated their worldliness with wisdom (Duke, n.d.). In *The Apology* (Cooper & Hutchinson, 1997), Plato dramatized how galling it was for his mentor, Socrates, to be accused of sophistry. Unlike the sophists, Socrates refused to use flowery rhetoric. Rather, he spoke in the common idiom of the time, even while standing trial. It was in this language that he defined his own wisdom, stating that it came from knowing that in fact he knew nothing at all (*The Apology*, 20c-24e).

Plato, who lived in the 4th century B.C., faithfully recorded the philosophical notions of his teacher, Socrates. In *The Apology*, he depicted Socrates declaring that only God can achieve wisdom. Men, Socrates asserted, were limited to loving wisdom from afar (women, in ancient days, were of course overlooked when discussions turned to intellectual matters). In both Plato's *Republic* and in *Laws* (Cooper & Hutchinson, 1997), Socrates referred to wisdom as a foundational and consolidating virtue, matched only in its worth by temperance and self-knowledge (Cooper, 2017). Plato's student, Aristotle, advanced and complicated the matter. He accepted the idea of human wisdom in *Nichomachean Ethics, Book VI*, and agreed with both Plato and Socrates in considering wisdom as a virtue (Schollmeier, 1989). However, Aristotle disagreed that wisdom consolidates the other virtues. He asserted that wisdom is a moral virtue available through the "golden mean," which is moderation (Rivera, 2005). Further, he seemed to believe that Plato had made a muddle of defining two different types of wisdom; hence,

he recapitulated and elaborated on both. One of these is practical wisdom (*phronesis*), which signifies the outcome of thinking and acting prudently. This would be the result of having spent time reflecting on and contextualizing experience. The other is theoretical wisdom (*sophia*), which signifies the outcome of thinking and acting objectively (Cooper, 2017). As with many ancient definitions of wisdom, there has been speculation that Aristotle's understanding denotes an experience different from what contemporary readers would anticipate. Moran (2018) explained that Aristotle recommended doing good deeds only to the extent that they would be personally beneficial (p. 98). This is reminiscent of Shuruppak's advice to his son on prudent behaviour. Aristotle, and presumably men of his class and era, believed that one could not be both intellectually excellent and moral. In fact, morality was considered an inferior virtue. Esteemed above all other characteristics by philosophers of that time were one's intellectual skills (Csikszentmihalyi & Rathunde, 1990).

In ancient Greece, wisdom was a frequently discussed, yet often contested concept. Heraclitus, who was born around 504 to 500 BC., referred to wisdom as mysterious and hard to acquire (Wheelwright, 1959). The eldest son of an aristocrat in Ephesus, Heraclitus scorned an inherited political and religious office and with apparent relief permitted a younger brother to take over the ceremonial duties. Released from this obligation, Heraclitus pursued the life of a philosopher and widely acknowledged snob. He was known for his deliberately cryptic use of language (Wheelwright, 1959). According to Posner (2006) the rhetoric of Heraclitus in the original is so difficult to parse that it has "vexed critics from Plato and Aristotle through to the present" (p. 1). One of the deciphered passages contains Heraclitus' elitist understanding of wisdom. He

proclaimed that wisdom was hidden, but not from those with the ability to "discern the unapparent in the apparent" (Pritzl, 1985, p. 303). He insisted that wisdom did not rely upon experience for development. Rather, Heraclitus described wisdom as a singular phenomenon with enigmatic, spiritual connections.

Later in history, books that came to form the Hebrew scriptures (the Christian *Old Testament*) also formed the basis of Western ideas concerning wise conduct (Woods, 2005). These scriptural chapters include Ecclesiastes, Proverbs, Job, and The Wisdom of Solomon. Belonging to the canon of Biblical Wisdom Literature, each book strives to provide guidance on human conduct (Bratcher, 2006). A recurrent motif in the Hebrew scriptures is the experience of facing a dilemma, which is frequently portrayed through the trope of choosing between two paths (Bratcher, 2006). A parallel is seen here to the crisis, or *disorienting dilemma*, that Mezirow (1978a) considered the impetus for perspective transformation. As with biblical characters who must decide between two equally compelling or difficult choices – for example, Job, who must either renounce God or accept that God will inflict suffering upon the just – those who experience a disorienting dilemma must navigate a circumstance where familiar routes are blocked. The only option, other than abandoning oneself to despair, is to develop a new path of action or way of thinking. It is in the successful completion of a trying journey that one achieves a new point of view, or transformation of perspective.

Another correlation to the biblical theme of encountering dilemmas is the epigenetic scheme of life course development (Erikson, 1993). At each stage, one is purported to face a significant psychosocial crisis. Implicitly concurring with the ancients and explicitly endorsing the stage theory of Erikson, modern scholars have suggested that

encountering life's inevitable paradoxes is a normal yet highly significant step in psychological growth (Lachman, 2004; McAdams, 2001; McAdams & de St. Aubin, 1998). Thematically, one could consider Ecclesiastes 3:1 to be a precursor to stage theory itself. The narrator, Qoheleth, decreed, "there is a time to every purpose under the heaven" (*The New King James Version*). He then proceeded to catalogue the predictable events of life and their corresponding opposites, such as birth and death. Soon after, in Ecclesiastes 7:15, Qoheleth elaborated on the familiar theme of injustice and inexplicable fate: "In this meaningless life of mine I have seen both of these/ the righteous perishing in their righteousness/ and the wicked living long in their wickedness" (*The New King James Version*). This again recalls the story of Job, an early book in the Old Testament, which was estimated to have been written between two and four centuries prior to Ecclesiastes. Besieging Job – a good and God-fearing man – was a relentless string of bad luck. Near the end of his suffering, he concluded that wisdom comes from fearing the Lord. It seems that the trope of wisdom obtained through what Mezirow (1978a) referred to as disorienting dilemmas – and what others have referred to as unjust turns of fortune – was a perennial favourite among the Hebrew literati. It is noteworthy in Ecclesiastes 7:15 that Qoheleth's counsel on the matter is businesslike rather than spiritual. After presenting the image of bad things happening to good people, he advises, "be not just to excess, and be not overwise, lest you be ruined" (*The New King James Version*). Like King Shuruppak and Aristotle, Qoheleth preaches a wisdom of prudence and moderation.

Working within the tradition of the Roman Catholic Church, both Thomas Aquinas (1225–1274) and Augustine of Hippo (354–430 A.D.) are notable for their synthesis of

classical philosophy and theology (Birren & Svensson, 2005). This is significant because the Christian church, throughout its first 1,000 years, scrutinized Greek philosophy with suspicion. The earlier of the theologians, Augustine, proposed that wisdom works collaboratively with one's understanding of the material world. Together, wisdom and understanding produce intelligence. Those seeking wisdom are advised to retire from the sinful world because wisdom is "considered to be moral perfection and without sin" (Birren & Svensson, 2005, p. 7). Approximately 800 years later, during the Middle Ages, Aquinas gently upset this notion by meticulously demarcating clear boundaries between the wisdom found in Christianity and the wisdom found in philosophy. He accepted the existence of the human wisdom identified by Aristotle, allowing that it was inferior to the wisdom of those grown wise through Christianity (Rice, 1958, p. 18).

Throughout the periods commonly known as the Renaissance (approximately 1300–1600) and the Enlightenment (1685—1815), philosophers took up the task of defining the parameters of wisdom in relation to other areas of human life. Wisdom became civic rather than solitary, and "more preoccupied with virtuous actions than with knowledge of the truth" (Rice, 1958, p. 30). The writing of Petrarch, a literary moralist of mid-14th century Tuscany, is illustrative of how wisdom developed a human character during the Quattrocento. Considered the founder of humanism, Petrarch wrote in *De vera Sapienta* that a wise man will never admit to wisdom. Rather, the "peak of his knowledge is the knowledge of what he lacks" (Rice, 1958, p. 34). Following Petrarch, the Florentine humanists vigorously debated whether introspection and piety or experience through civic action held the key to wisdom. Neo-Platonism and its "renewed defense of the contemplative life" eventually won this debate (Rice, 1958, p. 58).

An author who flirted with Platonism yet ultimately rejected it was the French poet, essayist, philosopher, and noted cynic Montaigne. In France, during the late 16th century, he portrayed the wise as those who are cognizant of their ignorance. This notion, previously proposed in Plato's *Apology*, was familiar to the educated class of the time. Montaigne (1580/1952) also argued that society had conflated the idea of wisdom with virtue. Through the integration of these two concepts, Montaigne perceived that people interpreted their impulses and actions through a mixture of popular mores and theological prescripts.

During his lifetime, Montaigne was widely considered no more than an entertaining and introspective writer of philosophical maxims. It was only after his death that his writings gained popularity among philosophical skeptics, who recognized Montaigne for his importance (Emerson, 2009). Montaigne's appeal to those with a taste for paradox is evident in essay XXIX, *On Moderation* (1580/1952). Here, he comments that wisdom, personified as a woman, both regulates one's access to pleasure and hides the full pain of existence. In her well-meaning virtue, wisdom inadvertently dulls the experience of life.

Francis Bacon, Montaigne's contemporary in England, took a different approach altogether. He revered science and inductive reasoning as the highest possible attainments (Birren & Svennson, 2005). Although he appeared to consider the idea of wisdom, especially in his analysis of pre-Christian myths, he did not provide a blueprint of how one could become wise. That said, he did leave behind some memorable quotes on the topic. For example, he wrote, "It is impossible to love and to be wise" (Rice, 1958, p. 23), which stands as a testament to his alleged romantic misfortunes. In 1601,

Pierre Charron wrote *De la Sagesse* (*On Wisdom*), which drew upon Montaigne. Charron's contribution was to explicate the secularity of wisdom and to present it as a "naturally acquired moral virtue" (Rice, 1958, p. 179). Unlike Montaigne, Charron provided advice on how to acquire wisdom. He directed this guidance toward those not fortunate enough to have inherited it at birth. Charron postulated the development of wisdom through the studious acquisition of prudence, fortitude, temperance, and a just nature (Rice, 1958, p. 180). Within the same era, Archambault (1967), writing of wisdom in the 15th and 16th centuries, stated that a rupture had occurred between the concept of political and personal wisdom. While humanists of that period clung to the notion of wisdom as a moral virtue, those active in political life saw wisdom as a pragmatic and morally neutral idea, framed by a "perennial Machiavellianism" (p. 631). Wisdom, to those living outside of cloisters, was difficult to acquire because of the rough necessities of existence. Among the sophisticates of the Renaissance, it was a mark of wisdom to compromise ideals in the business of survival.

The Enlightenment was a difficult period for the study of wisdom, as philosophers began to distinguish between the wisdom of reason and the wisdom of faith. Bleyl (2000) remarked that the mind/body split proposed by Descartes was in fact an amplification of the hierarchy initiated by Plato, who had earlier suggested the inferiority of emotional thought (mythos) to rational thought (logos). Both Descartes (1596-1650) and Locke (1632-1704) recognized a relationship between wisdom and reason (Birren & Svennson, 2005). Descartes considered religious wisdom to be a separate phenomenon from the wisdom attained through reason. Locke, the founder of empiricism, further complicated matters by proposing that reason came in two forms. The first type involved "inquiry into

what we know with certainty," and the second was "an investigation of propositions that we are wise to accept" (Birren & Svennson, 2005, p. 11). Immanuel Kant (1724 -1804), echoing Socrates, claimed that it was impossible for men to possess wisdom; rather, they could only be wisdom lovers (Birren & Svennson, 2005, p. 11). Arthur Schopenhauer (1788-1860) departed from the themes of other Enlightenment philosophers by looking for inspiration in the Stoics of ancient Greece. In *The Wisdom of Life*, he expounded on what he believed to be the three pillars of happiness: personality, property, and position. To Schopenhauer, intelligence was vital to happiness, and happiness was wisdom (Birren & Svennson, 2005).

From time of Plato to that of Charron, the meaning and interpretation of wisdom changed dramatically although the word-for-word definitions altered little. "Word and definition remain static; the idea itself is transformed by the changing needs and aspirations of successive epochs, centuries, and even generations" (Rice, 1958, p. 2). This quest for explanation and classification is one of the ways that wisdom philosophy of the West differs from that of the East. According to Takahashi and Overton (2005), Eastern wisdom literature contains noncognitive, transformative, and integrative features. The Eastern portrayals of wisdom propose an affective, intuitive form of understanding that circumvents overt reasoning. For example, Siddhartha proclaimed that wisdom is the outcome of contemplation and life experience (Takahashi & Overton, 2005). The author referred to as Lao-Tzu recommended a close relationship with the natural world as the way to achieve wisdom (Bates, 1993; Birren & Svensson, 2005). This suggests that a common understanding of wisdom exists in both cultures despite the many differences that separate their intellectual traditions.

Another renowned Eastern thinker who followed Lao-Tzu was Confucius, who defined wisdom as having “knowledge that one does not know" (2007, p. 4). Although the East and West were virtually unknown to each other at the time, this description of wisdom is nearly identical to that provided approximately one century later by Socrates in Plato’s *Apology*. This suggests that a common understanding of wisdom exists in both cultures despite the many differences that separate their intellectual traditions.

The Berlin Wisdom Paradigm and the value of dialogue. Chandler and Holliday (1990) argued that wisdom went out of fashion in the Western world for a period as the result of “a string of intellectual disasters” (p. 123). During the Industrial Revolution, which ushered in positivism, behaviorism, and an unabashed reverence for the empirical, metaphysical ideas went out of favour in scholarly circles. In the face of 20th century technical-rational expertise, Western society “has taken a rather jaundiced view of wisdom, seeing the classic quest after its meaning as a kind of fool’s errand, best left to those in the business of compiling almanacs and penning messages for fortune cookies” (Chandler & Holliday, 1990, p. 125). Wisdom’s re-entry to the world of academic thought has been tentative, and complicated by awkward cross-cultural introductions. How knowledge and age relate to wisdom development has proven particularly difficult to articulate.

In recent years, psychologists have ventured to identify the knowledge that contributes to the development of wisdom. The Berlin Wisdom Paradigm has done the most notable work in this area. This instrument uses five criteria designed to measure the pragmatics of life: rich factual knowledge, rich procedural knowledge, lifespan contextualism, relativism, and uncertainty. Through these criteria, the Berlin Wisdom

Paradigm seeks to detect evidence of psychological development or cognitive gains as one ages in adulthood.

When the Berlin Wisdom Paradigm is in use, test subjects engage in monologue while considering the overall significance of and most reasonable resolution to a proposed dilemma. After this, they pair with another subject and discuss a series of hypothetical dilemmas not unlike those they considered individually. The outcome, observed and assessed since the inaugural use of this instrument, is that subjects perform with greater wisdom when working in pairs. Effectively, the Berlin Wisdom Paradigm demonstrates that solitude does not necessarily bring about clarity of mind.

In an experiment that used the Berlin Wisdom Paradigm as an instrument, young and old participants displayed equal measures of wisdom (Staudinger, 1999b). However, only two years later, the Berlin Wisdom Paradigm found older adults to be wiser when in possession of high levels of moral reasoning (Pasupathi & Staudinger, 2001). Reconciling these disparate findings, Jordan (2005) referred to elders as those with a *wisdom advantage*. Yet this advantage is not available in all environments. Jordan decried modern Western society's tendency to remove older adults to communities where not only their bodies but also their minds receive minimal exercise. The availability of stimulating discourse attenuates or disappears if the older person enters a life of isolation after retirement. Contesting the notion that a life of seclusion and quiet contemplation might result in sagacity, Jordan discussed research that used the Berlin Wisdom Paradigm as the wisdom-rating instrument. This study found that those who use dialogue to resolve dilemmas do better than those who simply try to work things out by themselves (Jordan, 2005). Therefore, discourse is acknowledged as an essential activity

in the lives of the wise. That both perspective transformation and the development of wisdom can result from conversation between two or more critically reflective, rational, engaged speakers is helpful to those wishing to reproduce either phenomena.

According to Staudinger, Smith, and Baltes (1994), evidence from the Berlin Wisdom Paradigm indicates that those engaged in regular discourse achieve higher scores for wisdom development. Correspondingly, the theory of transformative learning posits discourse as an essential element in evaluative acts of communication. Nevertheless, Mezirow (1990) was realistic about how often this occurs in daily life. He noted that even the cleverest and most curious individuals will fail to engage in good conversation if they spend their days surrounded by dullards. In *The Wisdom of Crowds,* Surowiecki (2004) made a similar point while stressing the usefulness of polarizing opinions in a conversation. "Diversity and independence are important because the best collective decisions are the product of disagreement and contest, not consensus or compromise" (p. xix). As with the process of transformative learning, wisdom acquisition seems to flourish when dialogue tests assumptions. Nonetheless, knowing how to produce the effect and knowing what to call it are two different problems. As with perspective transformation, wisdom challenges seekers to encompass it with a universally satisfactory definition.

Defining wisdom. In 2000, Takahashi and Bordia studied cultural differences in definitions of wisdom. Fifty-three undergraduate students of Japanese, Indian, Australian, and American origin were assembled into four separate groups, then asked to rate the similarity of seven characteristics to the word "wise." At the conclusion of this multidimensional scaling analysis, the researchers asserted that the East and West

understand wisdom differently. Participants from the Eastern countries rated the words *aged* and *discreet* as belonging closely to the word wise. Students from the Western countries gave their highest ratings to the words *experienced* and *knowledgeable*. In 2016, Ferrari et al. conducted another cross-cultural study of wisdom. Through Chi-square analyses, they explored cultural differences concerning wisdom using Mohandas (Mahatma) Gandhi as the exemplar. In each of three groups – Indians, Canadians, and Indian immigrants to Canada – different clusters of qualities emerged as having contributed to Gandhi's wisdom. From the results of these studies, one can extrapolate that conceptions of wisdom are at least in part culturally determined.

Contemporary descriptions of wisdom often suggest that the phenomenon has a strong affiliation to virtue. Chandler and Holliday (1990) claimed that wisdom had no affiliation with "narrow forms of restricted expertise" (p. 133) but rather belonged to a "broader form of human understanding" (p. 133). In contrast, Csikszentmihalyi and Rathunde (1990), writing about the psychology of wisdom, referred to Northrup's (1947) finding that the East and the West hold different notions of "understanding." In the East, to *understand* is to intuit, to feel, and to think, albeit not through intellectualizing; in the West, to *understand* is a psychological process involving words. Robert Sternberg, a celebrated Western psychologist, stated "in the study of wisdom, most explicit-theoretical approaches are based on constructs from the psychology of human development" (1998, p. 349). Sternberg's Balance Theory of Wisdom provides an exhaustive definition of wisdom as

> the application of tacit knowledge as mediated by values toward the achievement of a common good through a balance among multiple (a) intrapersonal, (b)

> interpersonal, and (c) extrapersonal interests in order to achieve a balance among (a) adaptation to existing environments, (b) shaping of existing environments, and (c) selection of new environments. (1998, p. 353)

In discussing how one can attain this state, Sternberg promoted the use of role models and dialectical thinking, especially during the process of trying to solve a problem (1998).

In their effort to characterize the traits of the wise, Csikszentmihalyi and Nakamura (2005) examined scripture, philosophy, and ideas of contemporary wisdom scholars, who have drawn heavily upon psychology. Wise persons, Csikszentmihalyi and Nakamura attested, have (a) the aptitude to probe beyond superficial meanings, (b) the capacity to recognize the boundaries of knowledge, (c) the ability to contextualize information, and (d) an understanding that aspects of life are fraught with ambiguity. Seligman and Csikszentmihalyi (2000) suggested that for wisdom to develop in an individual, a natural proclivity in that area must first exist. “It is a widespread belief that wisdom comes with age, but as the gerontologist Bernice Neugarten used to say, ‘You can't expect a dumb youngster to grow up to be a wise senior’" (p. 11).

In a paper concerning the intersection of creativity, intelligence, and wisdom, Sternberg (1985) defined *implicit theories* as “constructions by people (whether psychologists or laypersons) that reside in the minds of these individuals. Such theories need to be discovered rather than invented because they already exist, in some form, in people’s heads” (p. 608). Implicit theories are understood as precursors to explicit theories. Since the introduction of this term, scholars have used it to denote folk or lay beliefs regarding wisdom (Ardelt, 2004; Glück & Bluck, 2011; Glück, Strasser, & Bluck,

2009; Hu, Ferrari, Gao, & Weare, 2016; Knight & Parr, 1999; Samuelson et al., 2015). In 2005, Bluck and Glück examined implicit theories of wisdom found in contemporary psychological literature. Discussing the rationale for their study, they wrote, "Psychological research offers conceptual psychological definitions that are congruent with but go beyond what is found in the dictionary" (p. 84). Further, they noted that implicit theories, drawn from lay or folk perceptions of the matter, look at "mental representations of what constitutes wisdom" (2005, p. 84). Unlike explicit theories assembled by experts, implicit theories do not begin with a priori definitions. Summarizing their findings, Bluck and Glück identified strong fluid and crystalized intelligence as prerequisites to wisdom. Other consistent aspects they discovered were descriptions of the traits of those who are wise. These included a reflective attitude, insight, concern for others, and problem-solving abilities in real-world situations.

Of special pertinence to this study, Gunawardena et al. (2019) commented on those characteristics that might belong to someone wise. They stated that:

> Wisdom emerges from a rare mix of skills and values: humility, inclusiveness, kindness, generosity, and reflectiveness. Wise people listen before speaking and consider collective benefits before individual gains. Wisdom often appears alongside another core element: transformative learning. Wise people engender transformative learning in themselves and others, while transformative learning increases wisdom. (Gunawardena et al., 2019, p. 7)

Depicted in the relationship of wisdom to transformative learning is a reciprocal arrangement where one phenomenon stimulates the other.

The wisdom of women. In the Judeo-Christian tradition, the book of Proverbs is essential to the study of wisdom. Discernments on virtuous living abound. These pronouncements on living well are intended to help both the secular and theological readers of the text develop soundness of mind and character. Personified as a woman, Wisdom is of great interest to feminist theologians such as Moltmann-Wendel (2012), who described her as both sensual and intellectual. For example, Wisdom demonstrates a welcoming physical affection toward her friends and yet feels confident enough to proclaim her credentials to those she meets in the marketplace. Wisdom is a networking, multi-tasking, poised, and successful character who edifies others. She performs higher-order thinking tasks, such as planning and decision-making, which suggests "equality between the genders, but also between the creator and the created" (Moltmann-Wendel, 2012, p. 161).

Jones (2010) performed a pre and post second-wave feminist analysis of the woman Wisdom through scrutiny of Proverbs 8:22-31. Exegesis of these passages has drawn much interest in recent years; Jones noted that interpretation has varied greatly depending upon where scholars locate themselves theologically, academically, and even upon which point they position themselves on the feminist spectrum. Overall, feminist interpretations have produced a depiction of Wisdom as more than a personification, but rather as a "mediator between the divine and humanity, and who was active as co-creator of the universe" (Jones, 2010, p. 81). This concurs with the interpretations of Camp (1985) and Yee (1992), who both argued that Book Eight of Proverbs contains a goddess figure. Their analysis challenges some modern versions of scripture. For example, the 2011 Common English Bible (which is the combined effort of 120 theologians)

translated Proverbs to present the character Wisdom as gender neutral. The de-sexing of Wisdom holds significance from both a feminist and pedagogic point of view. Erickson (2018) suggested that the personification of Wisdom as a woman was a literary device that ensured the attention of young male students. "Although men 'created' Woman Wisdom as a teaching tool to socialize boys, it is significant that they granted a feminine figure such tremendous authority and presented her as leading people to God through her teaching and wise ways" (para 2).

The image of the goddess is of recurrent interest to women scholars from a variety of fields. Taking the standpoint of a feminist theologian, Moltmann-Wendel (2012) noted that biblical Wisdom "carries unmistakable signs of the Egyptian Maat, the life-giving goddess of love, and Hathor, the erotic Syrian goddess…and the Egyptian tree goddess and reveals traces of the Isis (Iris) cult" (p. 158). This indicates that Wisdom is a compilation of strong goddess figures throughout ancient history. Bolen (2001), a feminist psychiatrist, looked to Greek mythology as a source of powerful female archetypes. Drawing upon the Jungian notion of activated archetypes, she urged contemporary women to seek these goddesses in themselves.

Speaking to those in the field of feminist gerontology, Bolen (2001) turned from the goddess and examined the archetype of the crone. Although the word "crone" derives from the word "carrion" (*Oxford Living Dictionary*), Bolan did not focus on negative images. Rather, she considered the archetypal image of the crone as a wise woman, well versed in practical skills such as healing, and in possession of spiritual or magical abilities. Bolan discussed the crone image in the belief systems of India, the Métis, Roman Catholics, the Chinese, ancient Egyptians and ancient Greeks. In each

culture/belief system, the crone is a complex character. She is set apart from the virgin or mother figure by her shrewdness, her intuition, and her unexpected capacity for empathy. Bolen claimed, “The more we want to know a wisewoman archetype, the more likely that archetype will emerge in ourselves” (2001, p. 5).

Woodward (2003) took a different view of the wisewoman as archetype. She argued that wisdom conveys an emotion incompatible with the needs of the feminist movement. Among the elderly in the West, Woodward wrote, wisdom is simply a stereotype. More productive, she believed, would be a society that promoted indignation regarding ageism among the elderly. Advocating activism, Woodward said, “It is time to declare a moratorium on wisdom” (p. 205). Ray (2004) offered a different perspective. She anticipated the beginning of “crone consciousness” (p. 119) in feminist gerontology. This consciousness would bring with it an understanding and appreciation of the archetype of the wisewoman. Ray suggested that feminists might conduct wisdom research, but in a manner critical of patriarchal influence:

> In the croning of feminist gerontology, our research methods would include those we have practiced and perfected over the years, as well as those we come to as a result of experience and self-awareness, including contemplation, wise reflection, insight, and intuition. (p. 120)

This declaration is reminiscent of findings provided by Merriam, Courtenay and Bumgartner (2003) regarding the marginalized community of practice formed by those who identify as witches. Here, the woman who has moved through the developmental stages of maiden to goddess to crone is able to “pass along the wisdom and teaching” of a coven (p. 181). Noting that “the most significant learning is also transformative,”

Merriam et al. concluded that "Although clearly there is a cognitive dimension to learning, this study points out the shared nature of the learning, the need for practice, freedom to make mistakes, and opportunities to discuss experiences and reflect on those experiences" (2003, p. 187). Hence, socially constructed knowledge, augmented by praxis, is an accepted technique of learning among women who search for wisdom and empowerment.

Perspective Transformation

At the outset of this study, I echoed Gunawardena et al. (2006) by positing that my participants, who were about to take a course that used the WisCom instructional design model, might encounter such surprising insights that a perspective transformation would occur. Gunawardena et al. (2006, 2019) postulated that wisdom and transformative learning are closely related. A student taking a course built with WisCom was anticipated to acquire wisdom after having experienced perspective transformation.

Perspective transformation is the outcome of completing the 10 steps in what Mezirow (1978a, 1991) called transformative learning. Lawrence (2012), referring to Mezirow's original concept of the theory, described perspective transformation as a rational process of interrogating our assumptions and then correcting the distortions in our meaning schemes and perspectives" (p. 472). Transformative learning – which Mezirow (2003) hypothesized as a form of metacognitive reasoning – "is a process of examining, questioning, validating, and revising our perspectives" (Cranton, 2006, p. 23). Mezirow suggested that perspective transformation is related to adult development; he elaborated on this pivotal aspect of transformative learning by describing it as "a structural reorganization in the way that a person looks at himself and his relationships"

(1975, p. 162). Over the years, various theories regarding how the process of perspective transformation occurs have been proffered. These include connected knowing, social change, organizational, ecological, and extrarational knowing (Cranton, 2006). Defining perspective transformation from the standpoint of the extrarational, Boyd called it, "a fundamental change in one's personality involving conjointly the resolution of a personal dilemma and the expansion of consciousness resulting in greater personality integration" (1989, p. 459). Cranton (2006) submitted that the extrarational approach, identified by the non-rational elements suggested in the process, "holds the most promise for expanding the theory" (p. 329).

Erikson and Mezirow. Within their theoretical models, both Erikson (1993) and Mezirow (1978a, 1991) described times when adults experience important changes in their attitudes and conduct. Erikson depicted these periods as stages in psychosocial development and isolated each into an approximate age range. The eighth stage begins at around age 65. Therein, Erikson conjectured a crisis of ego-integrity versus despair. If the individual is successful in overcoming the natural inclination to lament lost chances and the passage of time, the adaptive strength of wisdom is attained. Mezirow (1991), describing transformative learning, stressed that it "is not a stage theory, but it emphasizes the importance of the movement toward reflectivity in adulthood" (p. 161). Adding that education augments this movement, Mezirow (1978b, 1991) built a case for perspective transformation. As with the change that occurs through the psychosocial development described by Erikson, those undergoing a transformative learning event must resolve personal dilemmas. By accepting the ambiguity innate to all dilemma and arriving at an acceptable solution, the individual can achieve a new level of psychosocial

maturity. The observations of Mezirow and Erikson are useful and comparable when applied to the topic of wisdom development among older adults.

Disorienting dilemmas. Perspective transformation does not necessarily occur as the result of education. Any life event that causes an adult to reevaluate previous assumptions and to forgo earlier habits of mind can be the catalyst (Mezirow, 1994). These life events, referred to as disorienting dilemmas by Mezirow, are the first of 10 steps in the climb toward transformative learning (1994). Accepting the conclusions of Labouvie-Vief and Blanchard-Fields (1982), Mezirow (1991) agreed that ongoing disorienting dilemmas throughout middle adulthood could result in altered perceptions by the time one reaches old age.

When first introducing the concept of transformative learning, Mezirow (1978a) described a process of movement from an initial crisis through to a point where one can reintegrate into society with a transformed perspective. In subsequent years, the initial framework expanded. Seeking a universal explanation of how adults experience significant character growth through education, Mezirow (1981) referred to theory developed by the German sociologist and philosopher, Jurgen Habermas. Mezirow (1981) borrowed from Habermasian notions of the technical, practical, and emancipatory arenas "of cognitive interest, or learning domain" (p. 63). Drawing on these, Mezirow submitted that adult learning is an experience that occupies three domains: *instrumental* (problem solving through empirical inquiry, and concerning cause-effect), *communicative* (making oneself understood and understanding the perceptions of others), and *emancipatory*. In this final domain, one is required to employ or, if it is absent, develop critical reflection. Within this realm of learning, Mezirow affirmed, perspective

transformation occurs. He described it as “the emancipatory process of becoming critically aware of how and why the structure of psycho-social assumptions has come to constrain the way we see ourselves” (1991, p. 61).

Emancipatory learning, wisdom, and discourse. There is a parallel between Mezirow’s emancipatory learning and Csikszentmihalyi and Rathunde’s (1990) description of how wisdom evolves throughout the life course. Csikszentmihalyi and Rathunde suggested that postformal thinking signals the time when wisdom can begin to manifest, as it is a stage of optimal adult development, when "one recognizes the relativity of various formal systems through life experience and is able to assume contradictory points of view" (p. 30). Mezirow (1991) claimed that an emancipated learner is free from "misconceptions, ideologies, and psychological distortions in prior learning that produce or perpetuate unexamined relations of dependence" (p. 87). Nevertheless, Csikzentmihalyi (1990) differed from Mezirow in one vital aspect. Unlike Mezirow (1978a, 1991) who produced a 10-step model of transformative learning, Csikszentmihalyi (1990) stressed that wisdom cannot be reduced to a formula. Csikszentmihalyi offered an organic model involving the growth of both affective and cognitive proficiency. Wisdom, he suggested, can only be developed through practice and experience (1990, p. 21).

Among the reasons for suggesting that wisdom-related and emancipatory knowledge are closely connected is the description of how one acquires and maintains them. Essential to both are critical thinking, stimulated by dialogical and dialectic modes of thinking. In contrast, those types of learning that Habermas (1971) termed *technical* and *practical knowledge* arrive through impersonal, detached experiences. Under the

term *intellectual knowledge*, Ardelt (2000b) described these types of learning activities as education through books, lectures, experiments, and the process of making objective observations. Moving toward the same conclusion as Mezirow and Habermas, Ardelt (2000b) indicated that dialectical thinking permits one to reach "beyond formal operational thought" (p. 778). By using this style of thinking, which allows for contradictions and does not rely on familiar classifications of reality, Ardelt (2000b) believed one can gain sufficient freedom of mind to begin acquiring wisdom. Similarly, Sternberg (2001), advocating purposeful wisdom development in U.S. schoolchildren, prescribed essays and classroom discussions to develop dialogical and dialectical thinking (p. 238). Dialogical thinking, he said, requires accepting points of view different from one's own. Dialectical thinking requires appreciating that ideas and their paradigms evolve over time. This flexibility of mind is essential, he affirmed, to the development of wisdom.

Explaining the relationship between discourse and the emancipatory domain, Mezirow (1997) said that it is, "a dialogue devoted to assessing reasons presented in support of competing interpretations, by critically examining evidence, arguments, and alternative points of view" (p. 6). To illustrate how discourse can play a role in emancipating one from assumptions, Mezirow (1998) discussed a project he participated in at the Massachusetts Institute of Technology (MIT). This experiment, referred to as *The Dialogue Project*, asked that participants form small groups and converse about their opinions or assumptions. By discussing beliefs that they maintained as a matter of habit, study members began to uncover not only the reasons for their assumptions but also the ways of thinking that had caused them to arrive at their various points of view. In

Frankfurt, Germany, the Berlin Wisdom Paradigm employed a comparable method, albeit for the purpose of scrutinizing wisdom and its development. The instrument, produced by the Max Planck Institute for Human Development, continues in use as an assessment tool today.

Although dialogue is crucial to wisdom development, reflection is also required. One needs time to quietly distill new learning. In a study on the effects of life experience, Weststrate (2017) found evidence that reflection on adverse circumstances can produce wisdom. The quality of reflection, however, determined the results. Wisdom only arose from reflection that was deep, exploratory, and analytical. Taking a different perspective, Rose (2013) asserted that there is a major difference between reflection and the analytical thought used in critical inquiry. Critical practices, Rose stated, are disruptive, and contrary to the ethos of reflective change. From Rose's perspective, the ideal of reflection is not to rupture previous worldviews, but rather to peacefully promote both personal and social strength.

Brookfield, like Rose, was careful to differentiate varieties of reflection when he stated, "reflection is not, by definition, critical" (1995, p. 8). Drawing on Mezirow (1990), he noted that critical reflection, which requires an honest and thorough appraisal of one's beliefs, is the type of introspective thought that contributes to transformative learning. In later writing on the topic of reflection, Brookfield (2009) problematized the idea of wisdom by saying that commonplaces and conventions are often mistaken as being wise. A dominant class or group can press others to abandon critical thinking and accept a variety of so-called wise assumptions. It is only through ideology critique that critical reflection can scrutinize inferential ladders for "false rungs" (Brookfield, 2009, p.

296). When one reflects on hegemonic influences – a process that can be as painful as it is productive – one examines, reevaluates, and possibly replaces notions that one has taken for granted.

Critical reflection, meaning schemes, and meaning perspectives. Over the years, Mezirow refined his theory of transformative learning by emphasizing the role of relationships, defining three types of reflection, positing the importance of critical reflection on assumptions, and introducing the notion of habits of mind and points of view (Kitchenham, 2008, p. 110). In 1985, he identified and described two essential elements in the transformative process. These elements were referred to as meaning schemes and meaning perspectives. Meaning perspectives are, "cultural and psychological assumptions within which our past experience assimilates and transforms new experience" (Mezirow, 1985, p. 21). These assumptions are the beliefs, value judgments, knowledge, and feelings that contribute to an interpretation (Mezirow, 1994, p. 223). As explained by Kitchenham, "A meaning perspective is a general frame of reference comprising a series of specific meaning schemes" (2008, 110). These meaning schemes are clusters of subconscious understandings, beliefs, and emotions.

Meaning perspectives are "the structure of assumptions within which one's past experience assimilates and transforms new experience" (Mezirow, 1990, p. 142). They are the expectations that provide one with points of view and beliefs. When one encounters a new experience, these meaning perspectives come into use. According to Taylor (1997) they are difficult to change because they have been acquired over one's lifetime. What one notices and remembers is the product of one's meaning perspectives. Mezirow (1991) indicated three types: epistemic, sociolinguistic, and psychological. The

epistemic meaning perspectives direct how one knows and uses knowledge. Mezirow listed those factors that shape epistemic meaning perspectives. They are (a) developmental stages (b) cognitive/learning/intelligence styles, (c) sensory learning preferences, (d) scope of awareness, (e) external/internal evaluation criteria, (f) global/detail focus, (g) concrete/abstract thinking, and (h) reflectivity (1991, p. 43).

Sociolinguistic meaning perspectives concern the influence of society and language. Shaping this meaning perspective are (a) social norms/roles, (b) cultural/language codes, (c) language/truth games, (d) common sense as cultural system, (e) secondary socialization, (f) ethnocentrism, (g) prototypes/scripts, and (h) philosophies/theories (Mezirow 1991, p. 43). Psychological meaning perspectives relate to emotions. Shaping these meaning perspectives are (a) self-concept, (b) locus of control, (c) tolerance of ambiguity, (d) lost functions – childhood prohibitions enforced by anxiety in adulthood, (e) inhibitions, (f) psychological defense mechanisms, (g) neurotic needs, and (h) approach/avoidance (Mezirow, 1991, p. 43). Within each meaning perspective is a meaning scheme. These are "knowledge, beliefs, value judgments, and feelings that become articulated in an interpretation" (Mezirow, 1991, p. 44).

Distilling transformative learning theory further, Mezirow (1985) proposed that within instrumental, dialogic, and self-reflective learning are three types of learning processes. These are learning within meaning schemes (improving current knowledge), learning new meaning schemes (acquiring new knowledge that is compatible with previous knowledge), and learning through meaning transformation (being unable to acquire knowledge unless the problem is redefined). Of the last type of learning –

learning through meaning transformation – Mezirow (1985) stated that the process requires “becoming aware of specific assumptions (schemata, criteria, rules, or repressions) on which a distorted or incomplete meaning scheme is based and, through a reorganization of meaning, transforming it” (p. 23). It is only through this type of learning that perspective transformation can occur. Mezirow noted that perspective transformation can take place in two dimensions, both of which are related to changes of meaning schemes. The first is through an accretion of transformations in a series of meaning schemes, which is a painless process (1985). The second, which Mezirow described as painful (1985), is through a “comprehensive and critical re-evaluation of oneself” (Kitchenham, 2008, p. 112). Transformative learning happens through critical self-reflection on those assumptions that had previously sustained one’s meaning schemes or perspectives (Mezirow, 1991, 1994).

Critical self-reflection on assumptions requires an assessment of how one has posed problems and constructed one’s meaning perspectives (Cranton, 1994, 2006; Mezirow, 1995, 1998). Through the vehicles of reading, or reading and discussion, or both plus life experience, one comes to perceive discrepancies between that known at present and that which was previously held to be true. Ardelt (2000b), writing on the topic of wisdom acquisition, proposed that critical self-reflection, practiced over time, is a means to overcoming biased, subjective patterns of thinking. Unless one develops the analytical skills to recognize these patterns, she suggested, wisdom is unlikely to appear. According to Taylor (1998), critical self-reflection on assumptions makes one "free from cultural distortions and constraints, allowing for open discourse" (pp. 9-10). Taylor

described critical self-reflection “a developmental process, rooted in experience” (1998, p. 11). Advanced age, then, could be beneficial, if not essential for success in the act.

The concept of critical reflection is another refinement of transformative learning theory. Mezirow (1995) specified three types of critical reflection, noting that each is responsible for the transformation of meaning perspectives and meaning schemes. The first, content reflection, concerns contemplation of the past. It could result in the transformation of a meaning scheme. The second, process reflection, requires thinking about the reasons for actions of the past. It “can include an assessment of strategies, tactics and theory, one’s feelings for a situation or one’s role as an actor within a specific situation” (p. 45). Again, the result could be the transformation of a meaning scheme. The third, premise reflection, involves considering the assumptions upon which one made decisions or performed actions in the past. When one completes this successfully, one can go beyond a meaning scheme and transform a meaning perspective. In discussing transformative learning theory, Merriam claimed, “mature cognitive development is foundational to engaging in critical reflection” (2004, p. 65). This supports a psycho-developmental view of transformative learning, in which change is epistemological, and occurs throughout the span of one’s life (Taylor, 2008). Implied is that more than one’s quantity of knowledge changes over time. Ideally, the way one processes knowledge also changes.

Kegan (2000) supported the notion that an epistemological shift is central to transformative learning and the perspective transformation that undergirds it. He noted that the “very form by which we are making our meaning” could change (p. 53). Lange (2004) ventured further. In a study on social and environmental responsibility, she found

that not only epistemological but also ontological change took place. The transformation was contingent upon citizen action; reflection alone was insufficient. Therefore, upon concluding a period of critical self-reflection, one might anticipate a positive life change featuring a more flexible, less dogmatic frame of mind. Changes might include an acceptance of ambiguity as a condition of life. Responses to events and people might become unbiased, somewhat detached, yet intrinsically concerned for the well-being of others. Altogether, this is a way of living considered emblematic of the wise (Bluck & Glück, 2005; Kunzman & Baltes, 2005; Sternberg, 1998).

Of course, this positive life change is the ideal outcome of critical self-reflection. Intense self-scrutiny in an educational setting can go awry in a number of ways. According to Boud and Walker (1998), well-meaning teachers can intellectualize the process by providing checklists for reflection, unintentionally preventing their students from exploring the emotional aspects of the process. Erring to the other extreme, unduly personal disclosures can create awkward and unbalanced situations; teachers can obtain more information than necessary or advisable about a student's life. Smith (2011), stated, "a further common drawback of using personal forms of critical reflection is that critical reflectors can slide into self-conscious cynicism, isolated thinking and self-absorption" (p. 215). She also mentioned that the time required for the critical exploration of different perspectives could distract students from the core knowledge and skills needed to master the discipline under study (Smith, 2011, p. 215). Clearly, this could stall course deadlines and prevent achievement of objectives.

Critiques and alternative points of view.The most pertinent of critiques of transformative learning came from Hoggan (2016), who made a case for understanding

the phenomenon as an analytic metatheory. Noting that transformative learning "is increasingly being used to refer to almost any instance of learning" (p. 57), Hoggan argued that it has "strayed from its theoretical foundations and no longer serves as a coherent theory" (2016, p. 58). To illustrate the disparate interpretations of the phenomenon, Hoggan (2016) referred to Taylor's categorizations of transformative theory in 1998 and 2007. Throughout these papers, Taylor noted and described psychocritical, psychodevelopmental, psychoanalytic, social emancipatory, neurobiological, cultural–spiritual, race-centric, and planetary genres of transformative learning (Hoggan, 2016, pp. 60-62).

> Explaining the notion of analytic metatheory, Hoggan further (2016) stated that
>
> There is a common phenomenon or a range of related phenomena that the theory attempts to explain that is independent of specific disciplinary perspectives. The analytic work of metatheory entails providing conceptual tools that function as a common vocabulary that cuts across disciplinary perspectives so that the diversity of perspectives can work together to inform an overall understanding of the phenomena. (p. 63)

Using this understanding, Hoggan proposed to clarify the definition of transformative learning. He suggested that it should be "conceived as separate from perspective transformation; it represents a metatheory under which individual theories aggregate" (Hoggan, 2016, p. 70). Before ascribing the label of *transformative* to a learning outcome, Hoggan proposed its examination for the qualities of depth, breadth, and stability. This implies that the change should have a considerable and lasting impact on

many aspects of an individual's life. Hoggan's rationalization is pithy: "If transformative learning theory is used to refer to everything, then it means nothing" (2016, p. 60).

To appreciate the significance of Hoggan's critique, it is vital to understand those that preceded his. Taylor, critiquing transformative learning theory in 1998, suggested that learning is understood variously by different cultures. Hence, a transformative learning experience in a non-Western nation would likely have features not anticipated by Mezirow. Taylor (2012) revisited and restated this topic over a decade later within the context of a critical review on the theory. By way of example, Taylor referred to Merriam and Ntseane's (2008) study of adult learners in Botswana, whose transformative learning included the culturally unique features of metaphysical interpretation of experience, gender roles specific to that society, and relationships within the community (p. 43).

Taylor (1998, 2007), Taylor and Cranton (2012) and Cranton (2006) stressed that transformative learning, although developed in the West, has been construed inconsistently therein. For example, Taylor and Cranton (2012) indicated that Freire's (1970) notions regarding emancipatory education reflect a view of social rather than individual transformation. Earlier, Cunningham (1992) stated that Freire's celebrated conscientization is simply another word for critical reflection. She further noted that Mezirow, unlike Freire, failed to acknowledge praxis as both an outcome of and a step toward transformation (p. 185). This is understood as Mezirow's reluctance to introduce socio-political rhetoric into his theory, or as his intellectual deference to Habermas, whose philosophical abstractions he clearly esteemed. Had he acknowledged praxis,

Mezirow might have been compelled to declare a call to action, pen a manifesto, or at least to describe optimal transformation. This missing piece has garnered criticism.

Another alternative to the conventional interpretation of transformative learning theory comes from Tisdell's study on media literacy (2008). He postulated that new experiences learned of vicariously through the medium of film and television might have a transformative effect. Of greatest interest in this construal is that the catalyst for change was pleasure, rather than pain. Mezirow's (1978a, 1978b) proposal that one must experience an onerous disorienting dilemma was posited by Tisdell (2008) to be an optional, rather than requisite element in perspective transformation – a point anticipated by Brookfield in 1995. Similarly, Clark (1993) and Courtenay, Merriam, and Reeves (1998) suggested that disorienting dilemmas can present themselves as a related series of profoundly important events, referred to as *integrating circumstances*. Arguing that isolated events are unlikely to produce enough change to cause transformative learning, Daloz (2000) submitted that only a succession of disorienting dilemmas could produce this effect. On a similar tangent, Mezirow remarked that transformative learning itself "may be epochal or incremental and may involve objective (often task oriented) or subjective (often self-reflective) reframing" (Dirkx, Mezirow, & Cranton, 2006, p. 125). This would mean that the tidy 10-phase slide from disorienting dilemma through to perspective transformation originally identified by Mezirow (1978a, 1978b) might be only one version of the phenomenon. Further, the disorienting dilemma itself has become an object of study, overcoming its previous role as a simple handmaiden in the process of perspective transformation. According to Cranton (2006), the emphasis has become "much more on encountering the disorienting event and critically questioning or

responding to the assumptions and expectations that make it disorienting" (p. 20). In other words, those experiencing disorientation might do well to stop and consider why they are having a dilemma at all.

One recurrent critique of Mezirow has been his apparent separation of the rational from the intuitive in his concept of transformative learning (Dirkx, Mezirow, & Cranton, 2006; Johnson-Bailey, & Alfred, 2006; McDonald, Cervero, & Courtenay, 1999). Courtenay, Merriam, and Reeves (1998) identified an increase in compassion when one experiences perspective transformation. Arguing that the rational point of view is distinctively Western, Johnson-Bailey (2012) implied that Mezirow failed to consider other cultures and ways of knowing when he isolated dialogue as the means to attaining perspective transformation. Early evaluations of Mezirow include that by Collard and Law (1989), who suggested that Mezirow overlooked much of Habermas, selecting only applicable segments in order to make emancipatory learning a suitable template for his own theory of perspective transformation. Taylor (1998) stated, "Mezirow is attempting to locate emancipatory education within the context of a liberal democratic system" (p. 23). As a result, no explanation was offered for how transformative learning might occur in non-Western and non-democratic environments. Collard and Law (1989) noted that by ignoring context "Mezirow robs from perspective transformation its power as an emancipatory theory" (pp. 105-106). Hence, the theory fails as a model applicable to all adult learners. Another critique, leveled by Taylor (1998), opined that ethnicity, race, gender, class, and sexual orientation result in more ways of knowing than Mezirow recognized. Enlarging on this line of thinking, old age can be understood as another context of learning that sits awkwardly outside of Mezirow's (1978a, 1991) theory.

Late-Life Learning

In contemporary Canadian society, growing old and being retired are undergoing change. The first of the so-called "Baby-Boom" generation is pushing back at prevailing notions of aging (Byles et al., 2013; Hudson & Gonyea, 2012; Jenkins, 2015; Sperazza & Banerjee, 2010). Increasing numbers appear to reject the model of retirement as a period of inevitable decline (Gullette, 1997; Thornton, 2002; Tornstam, 2005). Many use this time of life to start new careers, to enter programs of education, or to take up activities well outside their comfort zone (Barnes & Parry, 2004; Farrell, 2014; Goldberg & Beitz, 2007; McDonald, 2006; Price, 2002; Onyx & Baker, 2006; Simmons & Betschild, 2001). Retirement's traditional appeal – the idea that one can avoid demanding endeavours – has met with warnings from health professionals. While the perils of physical inertia have been foremost in the public eye, the hazards of mental inactivity have also amassed attention. Studies have cautioned that cognitive decline and dementia can follow extended periods of mental rest (Hultsch, Hertzog, Small, & Dixon, 1999; Nordqvist, 2013; Wilson et al., 2002). Further, those who performed moderate-to-highly complex tasks at their employment suffer greater and faster decreases in their cognitive functioning if they fail to engage in regular mental exercise after retirement (Bosma et al., 2003; Finkel, Andel, Gatz, & Pedersen, 2009; Rohwedder &Willis, 2010; Schaie, 2005). Stimulated by these warnings, a growing number of senior adults seek ways to challenge their minds through activities that demand sustained cognitive engagement. Although there are many avenues for intellectual challenge, of concern to this paper are those allied with or modelled after the University of the Third Age (U3A).

Late-life learning in a U3A. Members of any U3A are said to be in what is called the *third age* of life, which is a term popularized by Laslett in 1987. Although third age embraces the time from retirement until death, Smith (1990) argued that an age range cannot demarcate this period of life. A preferred definition of the third age is one's participation in an active retirement while still in good health. By removing the limitation imposed by an age range, the potential for vital involvement among retired persons in developed societies emerges.

The first U3A opened its doors in Toulouse, France, at the University of Social Sciences. The year was 1973. This was a period of widespread cultural change, when challenges to traditional ideas about social roles occurred, especially in the Western world. Today, the U3A continues on an international scale, maintaining the convictions that older adults hold a wealth of experience to share among themselves, that they deserve access to lifelong education, and that learning within the organization should be for its own sake rather than qualifications or awards (Principles of the U3A Movement, U3A, n.d.). Aiding them in this quest is computerized technology. Having grown wise to the ways of the digital world, senior adults are taking computer savvy with them into retirement. According to a survey by Statistics Canada (Arriagada, 2018), retired Canadians age 55 and older spend an average of 1.9 hours per day using digital technology. In years to come, those accustomed to the stimulation of work in technological and information-driven environments are likely to maintain and increase this level of participation.

Quantitative research on older adult learners. As a demographic group, the retired older adult learner has received scant attention in research. In 1993, Bynum and

Seaman surveyed 452 adults over age 55. All were students in a Learning in Retirement Institute (LRI), which is a North American learning community modelled after the U3A. The objective of the study was to discover incentives for membership. A 20-item scale measured motivations. Four reasons for student participation emerged. These were social contact, curiosity, a drive for self-actualization and perceived gaps in understanding and cognition. Employing this same measurement scale, Picton and Yuen (1998) conducted a cross-cultural survey. Their findings were similar to those of Bynum and Seaman (1993). The two strongest motivations for older adult learning were the sense of having a cognitive gap or gaps, and a basic feeling of curiosity. Kim and Merriam (2004) conducted a comparable survey in an LRI, this time using Boshier's (1971) Education Participation Scale (EPS), (2004). The participants, they found, felt a need for intellectual challenge. Farmer (2008) confirmed this finding, again using Boshier's (1971) EPS and by surveying retired professionals attending LRI programs in the southern U.S.A.

More recently, Xie (2011) did pre- and post-tests to determine changes in skills and attitudes within a group of older adult learners engaged in a computer class. He reported that the students benefitted from collaborative learning. In this respect, they performed to the same standard as younger learners. Another study done in 2011 used questionnaires and interviews to collect data from adult learners over age 50 who were studying in degree programs at the School of Distance Education (SDE), Universiti Sains Malaysia (Mohd-Nor). Findings related to student motivations revealed that steady income and good family support were important predictors of academic perseverance for the

participants. In 2014, intellectual interest was the highest motivator for 92 LIR students surveyed in South Carolina (Baral).

The question of motivation for learning in late-life, as seen above, appears to be a recurrent favourite among educational gerontologists and educational researchers (Baral, 2014; Boshier & Riddell, 1978; Dench & Regan, 2000; Kim & Merriam, 2004; Lamb & Brady, 2005). Common among these studies is their heavy reliance upon surveys, which produce reports on participant responses to a fixed range of ideas. Conversely, descriptive information obtained through observations and interviews regarding the older adult learner is scant. I perceive this to be a gap in the literature. Valuable observations have risen from the small volume of qualitative research conducted on older adults as learners. For example, using grounded theory, Duff (2009) found that older adult learners attending intergenerational classes in a postsecondary setting experienced enhanced self-esteem. Schaefer (2009), who used a phenomenological approach and a moderately complex intersection of lenses through which to examine her subjects, elicited useful information about the meaning of learning in late adulthood. Her findings led to the conclusion that an older adult might experience transformative learning not only through education, but also through the bold act of staging a return to school. In 2011, again using a phenomenological approach, Verstynen analyzed the cognitively structured metaphors used by older adult students in a bachelor's degree program. Findings included the theme of transformation, which was defined according to Mezirow's (1978a, 1991) 10-phase description of the phenomenon. In yet another phenomenological study, Clark (2013) discovered that many older adult learners perceive their return to school as a new beginning, often after a life-altering event. As the result of making

meaning through education, these older learners were revitalized; they sought praxis based on their new perspectives. More recently, Spaid-Ross (2015) conducted a phenomenological study regarding the experience of college students over 50 years of age. Interview data revealed that the participants believed post-secondary institutions had overlooked their demographic group when planning programs and services. As a result, these older adult students felt abnormal and found assimilating into academic life difficult. Interviews revealed that their identity as anomalies exacerbated an already stressful experience.

Late-life learning and women. The literature is largely silent on the topic of older women returning to school. This is of note because the participation of women in late-life learning, including enrolment in U3As, outstrips that of men (Hebestreit, 2008; Hietaluoma, 2008; Janiero & Jacob, 2014; Midwinter, 1996; National Office of Statistics, 2009). Although national surveys of U3A membership are infrequent, distributed unpredictably, conducted on a volunteer basis, and take place within a highly fluid member base, available statistics reveal significantly higher enrolment by women (Formosa, 2014). For example, the ratio in the UK for 2009 was 3:1 (National Office of Statistics, as cited by Formosa, 2014, p. 54). A survey of one of the 1,000 U3A groups in the UK found that in the Merton chapter, men represented just 20% of the membership of 800 (Ware, 2013). In 2011, the ratio in Australia was 3:1 (Beckett & Jones). In both Finland and Portugal, women represented approximately 75% of the U3A participants (Hietaluoma, 2008; Janiero & Jacob, 2014). Formosa (2005), a critical gerontologist, speculated that men resist becoming U3A students because they are uncomfortable with the predominance of women on the management committees and in the student

membership. In Formosa's words, "U3As are exceedingly feminized" (2014, p. 54). Rather than seeking to understand men's apathy, this line of argument blames women for men's low participation in this area of education. Moreover, it fails to explain what appears to be a superior interest in learning by women. Lin and Wang (2015) pursued this very question by applying Boshier's EPS (1971) to both their own participants and by re-examining previous studies using the instrument. They found that adult women often return to school to fulfill the need for a new beginning or to have a new experience. Baer's (2004) research on older adult women pursuing higher education supported this point of view. Nonetheless, she added that the notion of women returning to school for personal reinvention is weakly represented in current literature on adult and elder learning theory. This suggests that malestream research on motivation for adult learning has overlooked important socio-cultural determinants relating to gender. To rectify this oversight, Baer (2004) posited that women, regardless of their age or station in life, must lead lives of change. This change requires constant learning. "The necessity of becoming a lifelong learner often is built into the feminine role" (Baer, p. 30). Accepting this premise, it is noteworthy that Tennant and Pogson (1995) considered lifelong learners to be those individuals who show evidence of psychological development throughout the life course.

In a literature review concerning older adult women as learners, Wolf (2009) noted that the social roles of women have undergone enormous changes in recent years, "establishing a whole post-Levinson stage of life" (p. 57). Wolf provided evidence that older adult women navigate this stage by setting high goals for themselves in their

education, by seeking positive feedback from their instructors, and by building social capital:

> Never before have we had such an opportunity to work with older women who see themselves as developing for an extended lifespan. So, too, women come to the learning experience as skilled connectors. They glide into new dimensions of social organizations with skills long homed in social and civic settings, churches, neighborhoods, and parent organizations. They use these skills—this social capital—to negotiate new relationships and support systems. They leverage their social capital and experience reciprocal connections. (Wolf, 2009, p. 59)

Qualitative studies on older adult women learners are illuminating. An ethnography by McWilliams (2013) uncovered a marked divergence between older men and older women in their feelings about late-life learning. Whereas women – including those who had worked before retirement – found the tasks of learning to be stimulating, the men appeared to resent the added responsibilities necessitated by school. In 2014, Lee presented a case study on the experience of older adult Korean women attending university to obtain their undergraduate degrees. The women interviewed initially claimed that they were seeking further education to attain equal status with their university-educated children. Within six to 12 months of starting their education, however, their ascribed motivations changed. All these women – many whose lives had been disrupted by the Korean War – confessed to wanting education to satisfy their own longing and curiosity. The patriarchal Confucian culture had suppressed their desire for self-fulfillment, and perhaps even the ability to discuss personal needs. Education had

helped them transform and find their voices. Altogether, these qualitative studies suggest that complex socio-political reasons impel older women to seek further education.

Wisdom and late-life education. Although motivation for returning to school in late adulthood sheds light on nuances of the late-life experience, I considered any gathered data on this topic to be an incidental finding in my study. Of specific interest was evidence that late-life education using the WisCom instructional design model had provoked perspective transformation and wisdom development among course participants. The notion that this could occur evolves from both previous conceptual work and empirical studies. McClusky (1971) advocated offering education to older learners as a means of activating their wisdom. Peterson, Thornton, and Birren (1986) echoed this sentiment, suggesting that while mastery and competence should occupy children and younger adults, wisdom should be the educational objective of the older person. Both Thornton and McClusky regarded wisdom generation as a social and moral responsibility of the older adult student. The developmental psychologist Erik Erikson (1993) described the quest for wisdom as a feature of ideal late-life psychological development. In his epigenetic stage theory of the human life course, he portrayed wisdom as the adaptive strength that evolves when one has met life's challenges with appropriate responses. By doing this, one succeeds in completing the developmental tasks of a period referred to simply as *old age.*

Baltes, Staudinger, and Lindenberger (1999), foundational researchers in wisdom psychology, stated that wisdom has been proposed as an example of positive adult development in cognitive pragmatics (the mental processes involved in communication). They described wisdom as a motivational and cognitive metastrategy that protects

against the fragmentation of knowledge. On a similar tangent, Drag and Bieliauskas (2010) stated that despite cultural stereotypes to the contrary, “normal aging is not associated with global cognitive decline. In fact, semantic memory actually increases with age, coinciding with the accumulation of factual knowledge and wisdom over the life span” (p. 85).

Late-life learning, as noted by Moody (1986), may not provide intellectual satisfaction to students even when the course material could be considered quite stimulating. Cognitive needs might be the explicit or expressed motivation for enrollment; nonetheless, affective needs, triggered by a psychosocial task, could be the true impetus. In concurrence with Moody, Ardelt (2000b) identified an intersection of individual transformation and the development of wisdom in response to late-life learning. She noted that society’s elders often have the time to engage in dialectic and reflective thinking, which prepares them for acquiring wisdom. Prerequisites to this acquisition are thoughtful interaction with others and a desire to accommodate any resulting personal transformations. Drawing upon Kupperman’s essay on morality, ethics, and wisdom, Ardelt (2005) stated, “To develop wisdom, scholarly learning is less important than the realization of wisdom, which requires a personal transformation and good role models” (p. 17).

The Berlin Wisdom Paradigm takes a somewhat different approach and suggests that there are modifying factors that will influence one’s ability to become wise. These factors include age and a higher level of education, which both confer a wisdom advantage. Hence, an educated older adult will not necessarily become wise, but will have some leverage in this arena (Jordan, 2005). Courtenay and Truluck (1997) explored

the notion of wisdom acquisition through critical thinking in older adult education. They described connections between Mezirow's perspective transformation and meaning making, indicating that although the older learner's need to explore questions of existential significance had been documented "little attention has been given to the specific issue or issues that are relevant to learning opportunities for older adults" (p. 179). A menu of liberal arts courses is the usual panacea for this desire among elders to make meaning. Unfortunately, a class on history or literature might not serve the needs of a student going through a late-life developmental stage. According to Courtenay & Truluck (1997), the ideal courses for the older learner should provide opportunities to develop critical thinking, to elicit dialogue that challenges assumptions, and to help make meaning of life as it nears its end.

Late-life learning and the internet. In the U.S.A., older adults are the "fastest growing group of internet users" (McDonough, 2016). A similar trend exists in Canada among adults age 55 and over (Statistics Canada, 2014). In 2018, Statistics Canada released a study on time use in Canada. The author, Arriagada (2018) found that 22% of Canadians over age 75 use computers daily. Outside of North America, a sample of the most recently collected statistics on Internet use by those over age 65 indicated that 55.2% are active in Australia (Australian Bureau of Statistics, 2016-7) and 38% are active in Europe (Eurostat, 2015). A higher level of education early in life influences the older person's eager adoption of information technology (Cutler, Hendricks & Guyer, 2003; Or & Karsh, 2009; van Deursen & van Dijk, 2015). That said, late-life learning itself has an impact. Positive educational experiences in retirement can aid the older adult in overcoming computer anxiety. This in turn creates the self-assurance needed to

persevere and learn the necessary skills to get online (Boulton-Lewis, Buys, Lovie-Kitchin, Barnett, & David, 2007). Beyond gaining access to social networks, news, education, and other Internet offerings, many of those older persons who go online will reap another comprehensive benefit. According to Shapira, Barak, and Gal (2007), use of the Internet and computers improves the older adult's sense of empowerment and well-being. This contributes to their cognitive functioning and interpersonal relations. Therefore, by using the Internet as a learning tool, older adult students perform routine maintenance on their intellectual and psychological functioning.

Ageism and late-life learning. Despite evidence of active engagement with and eagerness to use new digital technologies, ageist stereotypes abound regarding older adults and their abilities. Stereotypes themselves can limit the older adult's ability to learn. Levy demonstrated this in 1996. In her study, two groups of older men and women took memory tests. Before testing began, the first group received instructions with language that emulated the qualities of wisdom among the aged. The second group received instructions with language containing negative ageist stereotypes. Not surprisingly, the memory performance of the second group was poor in comparison to that of the first. These results were verified in later research (Hagood & Gruenewald, 2017; Kirchner, Bock, & Völker, 2017; Strickland-Hughes, West, Smith, & Ebner 2017). It seems evident that the disempowerment of elders in our society through ageist assumptions can become a self-perpetuating cycle. Yet, as argued by Marcinkiewicz (2011), participation in a U3A can offset marginalization by reducing an older adult's social exclusion. For those physically unable to attend face-to-face classes, online learning offers the potential to improve quality of life. Computer-mediated discussion

appears to provide a way for older adults to retain or regain a sense of what Bandura (1977, 1989) referred to as *personal agency* and *self-efficacy*. Taking all of this into account, the need to understand, highlight, and draw attention to the online learning experience of a group of elders provided a powerful impetus to conduct this study.

The purpose of late-life learning. Why should education matter to those who are retired? Beyond the acquisition of instrumental and/or leisure skills, what purpose does late-life learning serve? What is the significance of learning in retirement? These are among the questions that those in the fields of social and educational gerontology strive to answer. Overshadowing these questions is a widely adopted exemplar that proposes a normative range of mental health or intellectual functioning that all seniors should hope to retain. It derives from the MacArthur Model of successful aging, published by Rowe and Kahn in 1998. This model presents a standard of aging that champions those senior adults who retain vigorous social engagement and high levels of both physical and cognitive health. Examined critically, "vigorous social engagement" as a measure of success in old age is an urban, Western, middle-class value. Furthermore, it overlooks older adults whose aging fails as "successful" because of limitations relating to geographical location, family obligations, disability, financial hardship, religious prohibition, language barriers, psychological duress, or social restrictions imposed because of gender.

Optimal physical health — a key aspect of the MacArthur Model for successful aging – is a value that does not accommodate the diversity of abilities that are celebrated as successes by those whose physical well-being deviates from an arbitrarily considered norm. Reliable cognitive health is another feat that the older adult might find challenging

despite a personal sense of aging successfully. Moreover, cognitive ability in the older adult is not easily quantifiable, predictable, or adaptable to continuums. Neuro-cognitive shortfalls can be occasional or frequent (Gauthier et al., 2006). A variety of underlying disorders can contribute to unpredictable or regularly reduced functioning in this area (Dalton & Janicki, 1999; DeCarli, 2003). As Western society has come to appreciate, cognitive health viewed as perfect freedom from mental illness of any form is a lofty and often unattainable ideal (Ellis, 1987; Valliant, 2012). Optimal physical and cognitive functioning is unrealistic for many, including seniors. To imply that one cannot age successfully because of some degree of psycho-cognitive, neuro-cognitive, or physical disability suggests a narrow definition of successful aging. This is a debatable notion, constructed out of ableist assumptions.

The field of social gerontology embraced the MacArthur Model of successful aging soon after its inception. Although the model contains what might be considered an outdated and prejudicial point of view, it is one that was not adequately challenged until 2015, when Martinson and Berridge published a systematic literature review and categorized 453 articles critical of the model. Rowe and Kahn (2015), acknowledging Martinson and Berridge's report, accepted that a normative model, such as theirs, is exclusionary and hence problematic. Without abandoning their model, they claimed commitment to "developing consensus about what successful aging is and how it should be measured by building on current empirical and theoretical work" (Rowe & Kahn, 2015, p. 593). Some might argue that the notion of "success" and the objective of measuring something as variable as aging is the greatest concern. Noting that gerontologists often reevaluate the criteria of successful aging, Opalinski (2001) found

that "access to information, connection to resources, and affiliation with others" (p. 203) – all affordances of Internet technology – can serve as an elixir for older adults. She further noted that 100% of those older adults surveyed in her study rated the Internet as an "important source of communication and interaction with others" (p. 210), yet 22% revealed that they suffered from some degree of physical disability. From this finding, one could extrapolate that the digital revolution has created a need to reevaluate the criteria for success in aging.

Development throughout the life course. Using a different yardstick from Rowe and Kahn, Courtenay and Truluck (1997) suggested that the ability to evaluate and synthesize experience and assumptions is a measure of successful aging. When one retires from work and adult children grow independent, previous roles disappear. Hence, an identity crisis often greets older adults (Erikson, 1993). Some might take this crisis as a cue to search for life's ultimate truths, fulfilling a quest for meaning through education. Following Courtenay and Truluck (1997), meaning comes from filtering experience and examining previously held assumptions (p. 184). Referring to transformative learning theory, Courtenay and Truluck indicated that perspective transformation could be considered a form of meaning making in the lives of older adults.

Moody (1976) was adamant that some types of late-life education could trigger meaning making. Frequently, he claimed, the older adult is simply maintaining a pretense of activity – a phenomenon since dubbed the *busy ethic* by Ekerdt (1986). As the late-life equivalent of the North American work ethic, the busy ethic ascribes virtue to industriousness of nearly any kind. Too often, the curricula in retirement learning communities perpetuate activity that fills time without meeting the existential needs of

the participants. The result is that students do not get help negotiating what Erikson (1993) referred to as the struggle of ego-integrity versus despair. These opposing emotional forces, falling within Erikson's eighth stage of psychosocial development, can only be resolved if the older adult engages successfully in the type of thinking that Mezirow (1998) referred to as critical self-reflection. Through reflection and discussion, older adults determine whether their lives have been meaningful. Erikson (1993) drew a similar conclusion. He posited that older adults feel moved to reconcile memories of the past with a growing awareness of death's approach. In so doing, they can achieve the *adaptive strength* of wisdom. This is a synthesis of interest, detachment, and acceptance of death's inevitability.

Offering as a point of comparison Erikson's (1993) epigenetic view of development throughout the life course, Jamieson (2012) examined learning in later adulthood from the *transitions model*. Originated by Hopson and Adams (1976), then enhanced and popularized by Levinson et al. (1978), the transitions model considers life events, rather than ages and stages, as benchmarks that predict behaviour. Edwards, Ranson, and Strain (2002) described transitions as disruptions of routines and "taken-for-granted worlds that are likely to engender reflexive self-and social questioning and, potentially, change" (p. 534). Unlike stages, transitions are crises in life that cause one to begin a new course of action. According to Jamieson, mature students often enroll in a class or a program of study as a way of coping. Bereavement, a move, or forced retirement are among the incidents that Jamieson (2012) encountered in her study, which involved 320 students over the age of 60. Important to note is that not all students

surveyed were in a state of transition. Revealing this, Jamieson concluded that the transitions framework "is just one way of understanding educational activity" (p. 210).

Acceptance of developmental growth in old age is a notion recognized only since the mid-20th century. This has led, at least in part, to ageist stereotypes. Thornton (1987), an influential Canadian gerontologist, noted that that until 1930 the concept of psychosocial development belonged exclusively to the period of childhood and early adulthood (1987). Before that point, psychologists considered adulthood as a time of declining abilities rather than cognitive and affective gain. Thornton argued that prevailing ageist myths were responsible for society's limited understanding of the elderly:

> Increasingly, labeling aging and the aged by way of mythmaking is an activity of professionals, information and media writers, and consultants who, with the best of intentions hope to inform and educate. Myths of aging have become acceptable in social and academic discourse because we believe we can refute them with the realities of aging—this is still ageist stereotyping regardless of intention. (Thornton, 2002, p. 309)

Critical and transformative perspectives on aging. Martinson and Minkler (2006) examined the ideal of volunteerism – the principle of working without pay as an act of civil engagement and social responsibility – among older persons. Taking the stance of critical gerontologists, they charged that unpaid pastimes normalize a widespread expectation that the elders in society should maintain lifelong productivity. From this perspective, volunteerism among older adults takes on the appearance of a coercive activity. While recognizing that remaining active in old age is a laudable

egalitarian ideal, Martinson and Minkler (2006) noted that this is not always possible or desirable. Taking a similar approach, Biggs suggested that spiritual renewal, contemplation, and rest should be considered acceptable activities for the old (2001, p. 213). In agreement with Briggs, Torstam (2005) recognized a positive late-life stage during which the adult withdraws from previous vital involvements. During what he referred to as *gerotranscendence*, the older individual disengages from activity and associations. During gerotranscendence, reflection, re-evaluation, and redefinition of oneself in relation to the world become acceptable and worthwhile preoccupations.

In 1976, Moody first examined the philosophical presuppositions surrounding the idea of education during old age. He found that our society "has no clear idea of why older adults should be educated – and this absence of fundamental philosophical reflection is ultimately dangerous to the whole enterprise" (1976, p. 276). Foreshadowing the work of Erikson (1993) and Erikson, Erikson, & Kivnick (1986), Moody portrayed senescence as a life stage wherein psychosocial needs should be resolved. He depicted late-life learning as an opportunity to advance wisdom (1986). Discussing this notion, he said, "Instead of encouraging elders to become more adept information junkies, we should encourage a complementary style of late-life learning based on the strengths of age and experience" (p. 135). The West, he argued, has abandoned the significance of being an elder as an outdated cultural relic. This in turn has tainted society's attitude toward providing education for older adults. In later writing, Moody (2004) charged that late-life learning has become a consumer product, packaged as a lifestyle enhancement for the New Age retiree. The result of this mindset is that education for older adults is similar in format and content to that offered to younger students. Moody and Sasser

(2017) suggested that educators should encourage retirees to take on mentorship positions within the classroom because the role "encourages intergenerational relationships, and it takes advantage of generativity and wisdom, the virtues to be cultivated in the second half of life, according to Erikson" (p. 17).

In his seminal overview of transformative learning, Taylor (1998) encouraged continued inquiry to determine the theory's applicability to diverse demographic groups. He remarked that educators hoping to promote perspective transformation among older adults should entertain the possibility that this group has a unique way of perceiving. If this were so, teachers would need to rethink their paradigms and change their approaches to late-life education. In fact, recent research into the cognitive abilities and learning preferences of the older adult has uncovered that they do in fact have different learning preferences. In 2012, through an experiment concerned with how older adults learn Smart Phone technology, Leung et al. found that over half of those tested rejected trial-and-error methods of acquiring instrumental skills. Their preference was to read manuals and follow written directions before experimenting. By comparison, younger students, aged 20-49 years, were comfortable with trial-and-error. This information could be of great significance to instructional designers working on courses for older adults. Other research has revealed that training older adults in the skill of inductive reasoning not only increases their cognitive ability but also improves their openness to experience (Jackson, Hill, Payne, Roberts, & Stine-Morrow, 2012). This finding has significance to the development of wisdom, and hence to the acquisition of wisdom through late-life education. As noted by Staudinger, Dorner and Mickler, "Openness to experience has been found to be the most important predictor of wisdom-related performance in the

personality domain for adults" (2005, pp. 198-199). An inference derived from this is that learning activities calculated to challenge assumptions and open a student's mind are most likely to foster the outcome of wisdom.

Instructional design for online learning communities. During the relatively short history of online teaching and learning, formulae for successful practice have developed out of necessity. To explain the concerns that warranted remedies, theories pertinent to online learning were established. Concurrently, academics who wrote of online learning borrowed theories from other disciplines and applied these to augment the emergent language of a young field. The result has been a significant change in how educators understand the role of the group in online learning (Thorpe, 2002). From 1979 to 1989, interaction was an activity in support of individual learning (pp. 147-148). Since 1989, a paradigm shift has occurred in how the role of the group is perceived in online learning (Thorpe, 2002). In recent years, independent study has become a means of supporting group collaboration. This shift represents not only a significant change of focus, but also a change of learning culture. Gunawardena et al. (2009), acknowledging how digital environments allow participants to negotiate and construct identity, adopted the term *idioculture*. The term denotes "a system of knowledge, beliefs, behaviours, and customs shared by members of an interacting group" (Fine, 2012 p. 36). The resulting community, when formed by learners in an online course, is a phenomenon that has attracted much attention from instructional designers. The challenge is to create online courses that encourage and promote learning while nurturing a sense of belonging among students in the class.

Dawn of a constructivist approach to learning in distance education. The Community of Inquiry (CoI) model (Garrison & Akyol, 2013), which evolved from socio-constructivist approaches to learning, emphasizes the importance of helping students to connect through collaborative activities. In online learning, constructivism is how students make meaning based on their previous knowledge, especially when accessing both the affordances of a dynamic learning management system and Internet resources outside the classroom. Early in the exploration of online learning, Jonassen (1994) predicted the relationship between distance education and constructivist pedagogy. Anticipating the future, he recommended an emphasis on the "...collaborative construction of knowledge through social negotiation" (p. 35). This denotes transactions developing from learner to learner as they encounter content and voice their interpretations. Not long after, Gunawardena (1995) posited three features of computer-mediated communication (CMC), which combine to create a "unique social climate that impact[s] interactions and group dynamics online" (p. 148). These features are, a) asynchronicity, b) communication that is text-based, and, c) interaction mediated by computer. Kanuka and Anderson (1999) provided further proof of a growing interest in how groups function in online learning. In their examination of constructivism and instructional practice, they claimed that the learning process should be a predominant concern of educators. They noted that in order for new knowledge to be constructed, learners must be encouraged to share, compare, and contrast their existing understandings. Prior knowledge should not be devalued, but rather accepted as essential to the process of learning.

Focusing specifically on how learning is shared in a constructivist environment, Wise, Zhao, & Hausknecht (2014) investigated how students "contribute and attend to messages of others in asynchronous online discussions" (p. 48). The problem driving their research was that "theoretical models of collaborative learning through online discussions presuppose that students generally attend to others' posts" (Wise, Hausknecht, & Zhao, 2014, p. 185). Contradicting this assumption, previous studies have demonstrated that students attend to online posts in "diverse and particular ways" (Wise, Hausknecht, & Zhao, 2014, p. 185). Using clickstream analytics, the researchers examined the online forum habits of one group of students. They found that the most responsive discussion posts came from those who demonstrated skill in a group of four approaches to reading comments from others, which is referred to as *listening*. The first two approaches are the *depth* and the *breadth* of listening, which indicate the amount read and the student's willingness to pause and appreciate what has been written rather than simply scanning the message. *Revisitation* concerns the listener's practice of going back to reread and reinterpret previous posts. The *temporal contiguity* of listening denotes the student's level of engagement in the different forum threads throughout the course. Extrapolating from these findings, it becomes apparent that a factor in the success of a constructivist-learning environment is the thoughtful engagement of learners who thoroughly read and consider the forum posts of their classmates before making remarks of their own.

Communities of learners. Those involved in a community of learners, and especially those responsible for facilitating these groups, need to be comfortable with what Moore (1989, 1991, 1993, 2007) would refer to as a "low structure" environment.

In this setting, students and teachers alike are subject to the unpredictability of dialogue. Dron, Seidel, and Litten (2004) remarked, “dialogue will inevitably lead to departures from planned outcomes and result in new, unanticipated learning outcomes” (p. 163). Hence, a community of learners fully invested in dialogue as a method of learning must agree that the knowledge they build cannot be predetermined. Although the outcome will be unknown, the parameters are loosely defined through reference to readings, commitment to process, agreed-upon group tasks, and a time frame.

This is not to say that the outcome of discourse in an online learning community will be vague. Rather, the outcome in this communicative setting is bound by negotiated meaning. Anderson and Garrison (1998) insisted, “Educational communication must be explanatory and not just confirmatory” (p. 98). The negotiation of meaning through reciprocal, consensual, and collaborative exchanges is what facilitates critical discourse. While designing an online course, one needs to consider the way that communication will transpire, how often those involved will be able to communicate, and the quality of that intended communication. Moore (1989, 1991, 1993, 2007) referred to this as *transactional distance*. Following this model, when dialogue in an online class is high, the transactional distance is low.

Moore’s theory of transactional distance (1989, 1991, 1993, 2007) has focused on the exchange taking place between teacher and learner. Nonetheless, in a constructivist community, the role of teachers is more facilitative. Their input might be in the form of Socratic questions intended to inspire new discussion, or as moderators of a class debate. Boyer (2005), discussing online education, both endorsed this approach and accentuated the role of the learner. The results of her study on older-than-average (25 to 26 years of

age) college learners found support for “student-centered, community driven, self-directed, and meaningful environments in online settings.” (p. 248). In an online learning community, and particularly in one formed with the intention of fomenting wisdom and perspective transformation, the exchanges need to have analytical and critical prowess while remaining respectful in tone.

Duffy and Kirkley (2004) advocated collaborative inquiry as a positive constructivist approach to learning in a distance education setting. Benefits of this interactive method include scaffolding the processes of inquiry and critical thinking, providing an arena where divergent perspectives can be presented, and the availability of a supportive environment where “common goals and motives” are shared by the community (pp. 114-115). Kasl and Yorks (2002) recognized a connection between collaborative inquiry and communicative learning as described by Mezirow (1997). What they described was more than a simple exchange of opinions. Rather, they perceived this shared ethic as “freedom from coercion, equality of access to information, and norms of inquiry that reinforce commitment to building shared meaning through consensual validity testing” (Kasl &Yorks, 2002, pp. 5-6).

Lipman (1991), noting distinctions between varieties of communicative acts, identified the difference between dialogue and conversation. He suggested that conversation is an act of cordiality and lacks an objective beyond the polite exchange of ideas. Dialogue, by comparison, is an act of collaboration; its objective is to reach at least a fleeting verdict on the matter under examination. Moore (1993) identified a similar characteristic. As dialogue participants build upon earlier contributions, a constructive learning environment develops. Later, Moore spoke to the synergistic element of

dialogue, which distinguishes it from simple interaction (2013). Brookfield and Preskill (2005) coalesced the notions of conversation, dialogue, and discussion. The result, when initiated in an educative setting, involves, "reciprocity and movement, exchange and inquiry, cooperation and collaboration, formality and informality" (p. 6). This model dovetails with the ideals of emancipatory education, described so passionately by Freire (1972).

The community of practice (CoP) – a term coined by Lave and Wenger in 1991 – is an ideal model for supporting emancipatory education. In online education, the CoP forms deliberately through instructional design that preserves knowledge. Discussion forums, learning objects, and recorded audio/video meetings allow students to instil group customs and leave artifacts for the benefit of future community members. Preservation of group products is a characteristic of both a CoP and the online wisdom communities the WisCom model aspires to form.

Community of inquiry and WisCom. On the surface, the CoI and WisCom models could appear to have sufficient similarities to be nearly identical. Gunawardena et al. (2019), responding to this observation, provided a list of differences between the two. Foremost, the CoI is a theoretical framework, whereas WisCom is a design framework. The CoI intends to serve as a guide to research regarding online communities, whereas WisCom intends to serve as a guide to online learning design. While defending the originality of their design, Gunawardena et al. (2019) allowed that WisCom shares a collaborative and constructivist theoretical base with the CoI. As with the CoI, WisCom is a process model intended for use by groups of persons learning online. Other similarities include concern with knowledge construction and reflection. Discourse is

vital in both the CoI and WisCom models, but Gunawardena et al. (2019) have maintained that there is a subtle, yet important difference in their purposes. In the CoI, discourse illuminates the individual thought processes of persons working within the group. In WisCom, discourse is a product of meaning making by the group. Beyond these distinctions, there is a significant theoretical difference between the two models. Gunawardena et al. (2019) described this by stating that:

> WisCom is grounded in sociocultural theory attributed to Vygotsky (1978) and other sociocultural theorists, and situates learning in the cultural context, focusing on the social processes of learning. Learning first happens in collaboration with others and is then internalized. In WisCom, community is central to the collaborative learning process. While both perspectives affirm that knowledge is dynamic, and shaped and created because of a constructive process, in COI these are inner construction processes, whereas in WisCom, reciprocal negotiation and meaning-making are social processes.
>
> (Gunawardena et al., 2019, p. 32)

Therefore, in addition to valuing the product of group discourse, WisCom's intention is to exteriorize the learning process within the group and make it explicit. This process, being overt, makes the constructed knowledge available to others who join the community. This reflects WisCom's overarching concern with group process.

Another difference between the CoI and WisCom is the understanding of social presence. Gunawardena et al. (2019) argued the existence of a more nuanced social presence in the WisCom model. Rather than simply being the result of communication, it relates to "the sense of connection with another person and the 'realness' of this person"

(Gunawardena et al., 2019, p. 33). Another difference between the CoI model and WisCom is in the understanding of teaching presence. Gunawardena et al. (2019) stressed that unlike the CoI model, WisCom reduces the "power differential between the teacher and students." This results from the social negotiation of meaning among those in the group

Finally, Gunawardena et al. (2019) advanced the notion that WisCom's use of learning technologies has the potential to be especially culturally inclusive and critical in mediating the construction of knowledge by the group (p. 33). In advancing this idea, they allowed that both the CoI and WisCom frameworks "provide insight for designing community-centered collaborative learning experiences online" (p. 33). The WisCom model is most appropriate for use when the constructed knowledge of the group is sought as a product, and when members of diverse cultures belong to the community.

WisCom instructional design model. As noted by Frechette, Layne, and Gunawardena (2014), the WisCom model is best suited to students who have experience in collectivist, high-context learning cultures (p. 60). Existing members must acculturate those new to the community through mentoring, modeling, and the use of social presence techniques. The pilot version of the WisCom model was intended to "foster reflection, sharing, knowledge innovation, and transformational learning" in an online CoP (Gunawardena et al., 2004, p. 57). Dubbed *Final Outcome Centered around Learner* (FOCAL), the pilot design proposed to enable a CoP "to create, discover, and apply the existing wisdom and wisdom potential that exists within its membership" (pp. 44-45). The anticipated outcome was transformative learning within an intentional wisdom community.

FOCAL and the WisCom model that followed were influenced by a yearlong field study on a virtual community by Cox (1999). Within this study, Cox made note of a connection between the dialogue in online discussion forums and the evolution of wisdom. Her investigation revealed that transformative learning occurs in the so-called "web of wisdom" that develops when an online community forms. The crucial element in sustaining a collaborative learning environment, she found, was discourse. Following this example, FOCAL established a temporary online community where reflective dialogue and collaborative learning could take place. Essential to the process of transformative learning and wisdom development was a diversity of perspectives. According to Gunawardena et al. (2006), the changing expectations and skills of students who participate in online learning necessitated new explanatory theory. The WisCom model enhances creativity in "courses focused on emergent issues, when there's a lack of consensus on the "best" solution – or even what "good" solutions look like" (Frechette, Layne, & Gunawardena, 2014, p. 58).

After its inaugural run in FOCAL, the conceptual framework for WisCom expanded to include a sociocultural philosophy of learning. Adding a sociocultural element is consistent with current trends, as this theoretical aspect has grown more prevalent in recent designs for distance education (Scott & Palinscar, 2013). Applying the sociocultural to education, Wertsch (1991) declared that new learners (a) would benefit from working with those already somewhat skilled in or familiar with the target tasks, and (b) would learn more efficiently when a variety of tools and signs remained in place as artifacts from one cohort to the next.

To enhance WisCom further, the designers operationalized and incorporated the theory of distributed cognition (Halverson, 2002; Hutchins, 1991; Ross, 2007; Salomon, 1993). Distributed cognition espouses the notion that knowledge is not in fact the possession of one mind. Rather, it disperses throughout people, places, representations, tools, and artifacts (Pea, 1993). As a counterbalance to this concept, Salomon (1993) asserted that cognition must be situated. Learning is a situated activity when students participate together within their environment, progressively making contributions that are more masterful.

When the WisCom instructional design model was originally tested (Gunawardena et al., 2006), some graduate students who had previously taken the course face-to-face volunteered to serve as mentors. They worked alongside the instructors, who also considered themselves to be serving a mentorship role. Community wisdom was the intended outcome of mentoring. The process, derived from Lave and Wenger (1991), is known as *legitimate peripheral participation* (p. 58). Through this method, situated learning activity experienced among newcomers in a community of practice moves centripetally, in a "…social world, dialectically constituted in social practices that are in the process of reproduction, transformation, and change" (Lave & Wenger, 1991, p. 123).

The notion of legitimate peripheral participation broadens the idea of cognitive apprenticeship to include transformative elements. Equal in the transaction are (a) the student's intention to learn, and (b) the social process. Through positive and continuous dialogue, a sense of belonging to a group increases. Drawing upon the notions of cognitive apprenticeship, distributed cognition, and legitimate peripheral participation, Gunawardena et al. (2006) proposed a cyclical module design. By so doing, they

hypothesized that the learner would have the opportunity to reflect, revisit assumptions, and review while collaborating with other students.

Since its inception, the developers of WisCom have used the model for online graduate courses delivered at both U.S. and Venezuelan universities. A Sri Lankan university also implemented the WisCom model for a professional development course. In 2019, after these uses of the model, Gunawardena et al. published an updated version of WisCom. Therein, they restated a central premise of the model. They affirmed,

> Wisdom often appears alongside another core element: transformative learning. Wise people engender transformative learning in themselves and others, while transformative learning increases wisdom. (Gunawardena et al, 2019, p. 7)

While elaborating and refining WisCom since its inception, the developers of the model have maintained that a symbiotic relationship exists between wisdom and perspective transformation.

The cycle of inquiry. The cycle of inquiry module design used by WisCom is based on recommendations by Bransford, Vye, Bateman, Brophy, and Roselli (2004). They promoted inquiry-based learning in the context of online modules that contain discrete challenges for the students. The overarching framework described by Bransford et al. (2004) was a project with an unwieldy name: Anchored Modular Inquiry Generates Ownership, Originality and Organizational Learning (AMIGO3). It derived from research at Vanderbilt University on how to design online learning environments. In developing the WisCom model, Gunawardena et al. (2006) were drawn to the modularity of AMIGO3, which is posited to enhance collaborative inquiry and reflective practice. WisCom, as an inquiry-based learning environment, works from the definition of

learning as knowledge construction. Students construct their understanding interactively, through a process of "theory building, criticism, and refinement based on their own questions, hypotheses, and data analysis activities" (Gunawardena, 2004, p. 144). Guiding course designers who implement the cycle of inquiry are groups of design tasks, each nested within one of five sequential steps, some of which contain more than one component. These steps are:

1. the introduction of a case, problem, or issue;
2. initial exploration;
3. resources/perspectives;
4. reflection/reorganization;
5. negotiation/preservation (Gunawardena et al., 2006, p. 223).

In 2019, when Gunawardena et al. reintroduced the WisCom model, the elements of Step 5 were separated into two parts. These two parts are Step 5, now called Reflection, and Step 6, called Preservation. As the 2019 publication came out after the completion of my research, I relied upon the original five-step model. Another modification in 2019 was that the developers changed the name of the original cycle of inquiry (2006) to *collaborative inquiry cycle*. As the intent of the cycle has not changed, I have referred to these aspects of the WisCom instructional design model by their original titles. I provide a depiction of the cycle of inquiry in figure 2.1.

Figure 2.1. WisCom cycle of inquiry module design.

Note. From "New model, New strategies: Instructional design for building online wisdom communities," by G.L. Gunawardena et al., 2006, *Distance Education, 27*(2), p. 223.

Important to note for the instructor of a course that uses the WisCom model is the cyclical movement, which, under ideal circumstances, influences the community and their inquiry. According to Gunawardena et al. (2006), "The emphasis moves from knowledge as distributed cognition created through the interaction between people and artifacts to knowledge as co-created commodity with a capacity for preservation and archiving" (p. 224). Inquiry, therefore, is continuous as students leave their combined knowledge for their successors to use.

The term *social presence*, borrowed from the community of inquiry framework (Garrison, Anderson, & Archer, 1999), is significant to the cycle of inquiry. Garrison (2009) defined social presence as the ability to communicate and develop relationships within a group in which one has a sense of belonging. Social presence serves both as a

means of establishing relationships and as a means of developing critical inquiry through group cohesion and open communication (Garrison & Akyol, 2013).

Progressing through steps in the cycle of inquiry. After they receive the learning challenge, students begin their initial exploration. This step in the cycle of inquiry is when students should be making evident what both Mezirow (1985) and Gunawardena et al. (2006) have referred to as meaning schemes. Gunawardena et al. (2006) stress the significance of this step in the development of the online wisdom community:

> The level of shared community identity and individuals' perception of member empowerment created here impact the transformational learning process throughout the cycle of inquiry. Designers must foster: shared identity, which can be developed by using social presence techniques (Gunawardena, 2004); shared goals and mission; opportunities for critical reflection, dialogue, emergence, change, and transformation; a safe environment for exchange of diverse views and multiple perspectives; nurturing smaller subgroups; mutual trust, intimacy, respect, and commitment; spaces for social interaction; and care for the common good of the members. (p. 224)

Next in the cycle of inquiry, students share resources of interest to the challenge. For example, a student might provide a hyperlink to a web page containing an application, a video, a quote, an essay, a photograph of pertinence to the matter at hand, and so on. Equally, the facilitator might have resources to share. Following this, reorganization takes place. Critical self-reflection is encouraged; previously held assumptions might be revised. At this point, students are encouraged to share their new

perspectives. In the final step of the cycle, negotiation and preservation take place. Artifacts of the knowledge built by the community are archived in a manner that supports "learning connections across the knowledge domain" (Gunawardena et al. 2006, p. 226).

Summary

Gunawardena et al. (2006) claimed to make inroads toward developing an instructional design model that helps to promote wisdom and transformative learning in subject areas where multiple perspectives and collaborative learning are advantageous. As asserted by Jonassen (1997), this type of course will present problems that "possess multiple solutions, solution paths, fewer parameters which are less manipulable, and contain uncertainty about which concepts, rules, and principles are necessary for the solution or how they are organized and which solution is best" (p. 65). A course concerning wisdom falls within this description.

As this literature review has explored, online learning communities promise stimulating opportunities for older adult learners to challenge assumptions, transform perspectives, and develop wisdom. Although both Bleyl (2000) and Edmondson (2005) remarked that scholars abandoned wisdom as an area of scholarly interest for many years in the 20th century, this appears to be changing. A revival of interest in the topic of wisdom is taking place in academic circles (Faure, 2013; Hatton, 2008; Seligman & Csikszentmihalyi, 2000). As computer-mediated education shifts toward a constructivist paradigm, communities of learners could participate in creating new knowledge in this area.

Chapter 3 will discuss in detail how I partially replicated the WisCom model (Gunawardena et al., 2006) in my research and how the development of wisdom in a

U3A was studied. I will provide explanation of the data-collection method, which was a case study using virtual-ethnography.

Chapter 3. Methodology

This study was an exploration of an opportunity for older adult learners to construct knowledge on the topic of wisdom in a non-formal online course. In the interest of theory development, the study examined whether perspective transformation, as a step toward transformative learning, ensues within a course using the WisCom model, and if this in turn triggers wisdom development. From a technical point of view, the study concerned the usefulness of the WisCom model when used with an older adult population. Because WisCom operates in the service of promoting wisdom development, the model and the transferability of its claims were tested with (a) a different demographic group, and (b) a different type of course than offered in the original research.

Originally, graduate students in a course concerning online learning were used as participants to test WisCom. In my study, I employed the WisCom instructional design model, but with older adult participants taking a non-formal course concerning wisdom. These changes resulted in my study being not a replication of the original WisCom trial, but rather a differentiated replication. As noted by Uncles and Kwok (2013), a differentiated replication determines if (a) empirical findings are generalizable, and (b) determines the range of conditions under which the findings hold (pp. 1399-1400). Taking this approach in my research seemed appropriate; developers of the WisCom model recommended that it should be tested "in different online learning contexts with diverse learners" (Gunawardena et al., 2006, p. 229).

Theoretical guidance in this study was derived from Mezirow's (1978a, 1991) writing on transformative learning, especially the element of perspective transformation.

Transformative learning theory has evolved from a method of inquiry that Habermas referred to as *constructive science.* "As distinct from empirical-analytical science, this constructivist approach to research analyzes symbolically structured reality and seeks to isolate, identify, and clarify conditions required for communication and learning" (Wiessner & Mezirow, 2000, p. 344). Another source of theoretical guidance was Erikson (1993), whose epigenetic scheme of life course development is frequently cited in psychological studies of wisdom development. Further direction was derived from Moody (1976, 1986, 1990), the bioethicist and prominent thinker in the field of social gerontology. Among his important contributions, he advocated education in service of self-actualization and psychological development for the older adult. Ardelt (2000b) made a similar proposition when she posited that dialectical and reflective thinking by older learners could result in personal transformation and wisdom development.

Among those academics endorsing the connection between transformative learning and wisdom, notable is Cox (1999), who posited the relationship while studying 12 adults using asynchronous online education. Ardelt (2000) proposed that dialectical and reflective thinking by older learners could result in personal transformation and wisdom development. Bleyl (2000) proposed that the reflective thought exercised throughout transformative learning as an element in wisdom acquisition. More recently, Bassett (2005), writing from an educator's perspective, stated, "Transformative learning can provide a means to strive towards wisdom" (p. 31). In this chapter, I will discuss the challenges and merits of my chosen method and the implications of this choice. I will provide details regarding the design of the course and how data were collected and analyzed.

Research Question

Following the research question are three sub-questions:

What happens in a discourse based, online course created with the aim of developing a wisdom community for older-adult learners?

Sub-question 1.

What is the observed impact and function of mentors in this online community of learners?

Sub-question 2.

What evidence is there of transformative learning in this online community of older adult learners using Mezirow's (1978a, 1991) definition and description of the phenomenon?

Sub-question 3.

In what manner does the "cycle of inquiry" (Gunawardena et al., 2006) in the WisCom model of instructional design appear to affect this online learning community?

Ontology and Epistemology

Virtual ethnography is an emergent way of describing social worlds. Drawing upon symbolic interactionism, and evolving from conventional face-to-face ethnographic methods, virtual ethnography is complementary to the notion that "social reality is an interpreted world, not a literal world, always under symbolic construction" (Altheide & Johnson, 1994, p. 489). Shared and agreed-upon symbolic meanings develop not only social reality but also the notion of place in a virtual environment. The virtual as a location takes on significance when one considers the effect of setting on human behaviour. According to Barker (1968), whose study of ecological psychology influenced late 20th century ethnographers, settings produce regularities in behaviour that can

transcend and amend differences among individuals. In a physical world, familiar objects provide clues to inform actions. For example, a whiteboard and rows of desks signal internalized notions of appropriate conduct for that location. Although certain behaviours are expected in virtual settings, norms can be difficult to establish and replicate in an environment that lacks visual cues. Approximating this conduct is complicated when virtual spaces comprise the geography.

The approach used in this investigation – a virtual ethnographic case study – is compatible with both the interpretive paradigm and the chosen research questions. Virtual ethnography allows for examination of social and cultural customs in computer-generated environments. Those using the method must chart places where words are the landmarks. As Braga (2009) stated, "relationships on the Internet are defined by acts of communication, considering that there is no "place" on the Internet" (p. 1616). As a research method, virtual ethnography retains many of the strengths and conventions of its face-to-face namesake. Miles and Huberman (1994) asserted that ethnographic research is descriptive, develops or refines theory, and concerns itself with "the behavioural regularities in everyday situations" (p. 8). The case study approach to ethnography strives to reveal cultural knowledge, how participants use it, how they communicate this knowledge, and its significance (Spindler & Spindler, 1992, p. 70). The merits of the ethnographic approach to research can be best described through comparison to experiments that use the scientific method. According to Libarkin and Kurdziel (2002), a quantitative approach can result in "an artificial categorization of phenomena that has little correlation with the real world" (p. 79). By comparison, ethnography preserves the context of research. In quantitative research, this is often "lost beneath the layers of

statistical analysis." (Libarkin & Kurdziel, 2002, p. 79). Another merit of ethnographic research is the "thick description" that is produced (Geertz, 1973). When the ethnographer reports, not only is the observed human behaviour described in detail, but so also is the environment. By contextualizing the behaviour, it becomes meaningful to outsiders. Therefore, in this study, the description of older adults learning online contributes to understanding a phenomenon that has to date received scant attention. Further, an element of comparison results from considering seniors as a group separate from younger adults in the scheme of human life-course development. This corresponds to what Wardle and Blasco (2007) stated to be the basic concern of all ethnography, which is "understanding different cultural or social life worlds by reference to each other, that is to say, through comparisons" (p. 3).

Determining and describing the site of research when using a virtual-ethnographic method is a point of philosophical significance. As noted by Markham (2005), the lack of geographical boundaries when one performs research using the Internet makes the act of entering the field "convoluted and elusive" (p. 257). Markham further stated that the researcher's ontological and epistemological assumptions become evident when they demarcate the borders of the field. If the ethnographic study occurs in a virtual environment, these borders are linguistic rather than geographic. "The ethnographer must read the texts and interactions of interest, much like trail signs, and make defensible decisions about which paths to follow, which paths to disregard, and thereby which boundaries to draw" (Markham, 2003, p. 53). Hence, in conducting a virtual-ethnographic case study, discarding and including selected data has implications verging

on the cartographic. Boundaries are erected in a territory that until then had existed only in the imagination.

According to Erickson (1986), one chooses interpretivism as the epistemological tradition to follow when the "substantive focus and intent" (p. 119) of a project recommends this approach. I developed the research question and sub-questions in this study to exploit the potential of interpretivist research for discerning both overt and covert patterns of participant behaviour as expressed through what they reveal in online discussion forums. The reason for using a wholly interpretive paradigm in this research was the possibility of discovering something previously obscured or overlooked. As Guba said, the interpretive paradigm evolves from relativist ontology where "Realities exist in the form of multiple mental constructions, socially and experientially based, local and specific, dependent for their form and content on the persons who hold them" (1990, p. 27). Relativism maintains that reality exists through the perceptions of the researcher and the study participants (Landri & Marques da Silva, 2012, p. 136). These realities are understood through "multiple, intangible mental constructions, socially and experientially based, local and specific in nature" (Guba & Lincoln, 1994, p. 110). This suggests a need for strong researcher reflexivity, especially during analysis of data. Throughout the findings in this study, the explanation of patterns and themes should be understood as construal open to discussion, rather than pronouncement poised for debate.

Research Design

This research was a virtual-ethnographic case study conducted in a non-formal course taken by older adult learners. Hancock and Algozzine (2016) commented that ethnographic case studies "explore the observable and learned patterns of behaviour,

customs, and ways of life" (p. 37). In this case study, the research objective was to observe and interpret the interactions of a group of older learners as they worked together within an asynchronous online course. Another objective was to determine whether the WisCom model functioned as promised by its developers. Therefore, I sought evidence that it promoted perspective transformation and the development of an online wisdom community.

I offered this online, non-formal course at a U3A. Students at this institute must be retired and at least 55 years of age. I developed my course using the WisCom instructional design model as the framework. The aim of WisCom is to develop wisdom communities. The model is intended,

> to design learning environments for ill-structured knowledge domains (Jonassen, 1997), where there are no right or wrong answers, where domain knowledge is evolving and there are multiple perspectives and contextual knowledge is critical to understanding a question or solving a problem. (Gunawardena et al., 2006, p. 219)

I chose wisdom as my course subject matter for two reasons. The first reason was that the U3A had not offered a course on this subject previously. The second reason was that forum discussion questions on the subject could access implicit theories on wisdom held by the participants. These insights, in turn, would be useful in determining a) if participant definitions of wisdom aligned positively with the definitions offered by academics and theologians, and b) if changes of perspective resulting from taking this course were similar to implicit theories of wisdom held by participants. These theories

were considered valid criteria in identifying the phenomenon of wisdom development throughout my course of study.

Site and Subject Selection

A U3A that offers online study agreed to run my course. Registration was open internationally. Although the WisCom model research by Gunawardena et al. (2006) had 15 students over one semester, they did not present this number as being integral to the design. Therefore, I did not cap the course at 15. Over two semesters, 23 participants completed the course. Eleven enrolled for the first semester and 12 for the second. Participant selection was criterion-based (Miles & Huberman, 1994) insofar as the participants were members in a U3A being used as the research site. Nevertheless, to some extent, participant selection was what Patterson (1980) referred to as a matter of convenience. This randomness is a peril of naturalistic research, and one that is certainly unavoidable when a classroom is the chosen site of research. Given women's greater participation in tertiary education (Turcotte, 2015; UNESCO Institute for Statistics, 2014), it was anticipated that more women would be represented in the sample. In fact, the total number of women who took the course was 17, whereas only six men enrolled.

I sought participants through advertisement of a course simply called *Wisdom*, offered at the selected U3A. Each participant was at least 55 years of age, as that is the minimum age of entry at the institute. After the participants expressed interest in enrolling, I emailed them a Letter of Consent inviting them to participate in the study. I assured them that their anonymity would be preserved through pseudonyms. Further, I promised to take rigorous care not to reveal identifying details in the final report. As a

result, in my Findings and Discussion chapters I have omitted or altered biographical details that were revealed through course forum participation and interviews.

Participant Demographic

In order to obtain more specific demographic information about my participants, I sent pre-questionnaires through Survey Monkey at the outset of both semesters of my course. In total, the participants returned 17 of 23 after follow-up reminders. From this information, I learned that the average age of these participants was 76. All who responded considered one Western nation to be their main place of residence. Two of those who responded to this question added a note that they had emigrated from another country. Nine had a spouse, two were divorced, five were widowed, and one had never married. Regarding previous education, 11 had graduated from college or university. One had a master's degree or professional designation. Four were high school graduates, and one had completed training for a trade. Of those who responded to my pre-questionnaire, two identified as male and 15 as women. Although not all responded to this questionnaire, I was able to surmise the gender balance in both semesters from the participant names.

Workshops

Given the structure of the research, a pilot study was too unwieldy. In lieu of this, I presented two workshops. They were attended by, respectively, nine and 12 university faculty and staff in Ontario, Canada. Differing from the participants in my research, none of those who attended my workshops were retirees. The first workshop was presented during an Ontario university's annual Teaching and Learning conference. I presented the second workshop to the Accessible Learning department within that same university.

Therein, prospective forum discussions were facilitated face-to-face and post-workshop feedback was gathered. The participants shared input that was useful in developing my course. Their comments confirmed the premise that topics concerning wisdom development would garner discussion among participants. After receiving feedback and reviewing my results, I removed or revised some of the discussion topics I had planned to use for the course.

The WisCom Instructional Design Model

For this study, I designed a course using the WisCom instructional design model. Gunawardena et al. (2006) originally developed the model to foster perspective transformation and wisdom development in online education. WisCom claims to provide the structure for a wisdom community built with knowledge innovation, mentoring, and learner support (Gunawardena et al., 2006). Transformative learning is the expected result of wisdom gains made while taking a course built with WisCom. “In the WisCom framework, wisdom is the ‘spark’ necessary for transformational learning to manifest” (Gunawardena et al., 2019, p. 65). In my research, the research questions I posed intended to (a) examine the ability of WisCom to promote a collaborative, constructivist-learning community, and (b) examine technical aspects of the design.

Using the cycle of inquiry model advocated by WisCom, I built a course on wisdom development. Two case studies were included. Prior to sharing their thoughts in the online forum, participants were asked to engage in individual, tentative exploration. Once prepared, they were encouraged to question, expand upon, and challenge one another’s perspectives on the matters under consideration. After individual reflection and restructuring of concepts, the group reconfigured online to discuss new definitions and

shared meanings. As a final step, I documented and preserved the participant comments in a forum archive.

The Course

I divided my course on wisdom into six modules. Preparing these lessons took me approximately five months, as I was concurrently working full-time at my university position. Throughout this period, administrative preparation for the course was ongoing by the gatekeepers at the U3A. With their help, I was recruiting my participant group via email.

Adapting to the presentation style of the U3A, the lessons I provided were completely text-based. Following advice found in the U3A teacher handbook provided to me, I used plain language (U3A Online Course Writing, Editing, and Proof-Reading Guide, 2015, p. 2). Cutts described plain language as "the writing and setting out of information in a way that gives a co-operative, motivated person a good chance of understanding the document at first reading" (1995, p. 3). This approach to language was taken throughout the course on wisdom for several reasons: to make the content more accessible to participants unaccustomed to reading academic texts, to make it comprehensible for non-native speakers of English, and to make it easier overall for those participants who might be suffering with cognitive impairments.

Each of the six course modules concluded with two questions for discussion in the LMS forum. When a topic of conversation moved in a new direction, participants had the freedom to add extra questions. These could be directed to an individual participant or to the class at large. It was my responsibility as facilitator to summarize a collaborative judgement or articulate a new question in these and other threads.

Participants were encouraged to reflect and write in their personal journals prior to posting their initial thoughts in any forum.

The following is a brief overview of the modules presented to the participants throughout both six-week semesters:

1. What is Wisdom? Who is Wise?

   Definitions of wisdom, wisdom in ancient literature, and contemporary views of wisdom.

2. Culture and Wisdom

   The difference between wisdom in the East and West. Folk wisdom. The notion that humility is a common factor in most wisdom traditions.

3. The Psychology of Wisdom

   The question of knowledge versus wisdom. Leading studies and approaches in brief, plus alternative points of view. The difference between *personal wisdom* and *general wisdom*. Six insights that psychologists have gained about wisdom.

4. The Voices of Wisdom in World Religions

   Wisdom as interpreted by Buddha, Confucius, Solomon, and Jesus. The role of religion in wisdom.

5. Morality, Ethics, and Wisdom

   Virtue Ethics. Stages of Moral Development. Phronesis (practical wisdom). Two case studies presented for participants to discuss, these being (a) Kohlberg's Heinz Dilemma, and (b) Captain William Kidd and the Philadelphia Pacifists.

6. Aging, Adversity, and the Growth of Wisdom

> Emotional Intelligence, resilience, research on adverse experience and the growth of wisdom.

I wrote each module in the first person, using a conversational style in which I provided self-disclosures. This was done following the advice of Brookfield and Preskill (2005), who stated, “If you’re asking students to discuss something that involves them in any kind of self-disclosure or personal revelation, make sure that you go first” (p. 147). My approach to leading the discussion forum derived from guided didactic conversation (Holmberg, 1995), with an emphasis on Holmberg’s first principle, which is that pleasure should evolve from a feeling of personal relationship between the learner and the instructor. My intention was to help the participants relax enough to share their ideas and pose questions to the larger group. The order of the modules was determined after deliberation on lesson sequencing and after having tested forum questions in the two workshops that I ran (see Chapter 3). The organizing principle for the modules in the course was replication of the cycle of inquiry found in WisCom. Describing how a group would move through this cycle, Gunawardena et al. (2006) state:

> The group navigates through a process whereby individual cognitions are shared (*initial exploration*), multiple perspectives are challenged, accommodated, and negotiated with peer learners and experts (*resources, perspectives*), and time is allotted for individual reflective restructuring in thinking (*reflection, reorganization*). This internalization occurs before the group works again in unison to produce shared artifacts to document the

knowledge commodities that result from the collaborative learning experience (*negotiation, preservation*). (p. 223)

In the interest of promoting transformative learning, which is a key objective of the WisCom instructional design model, I sequenced the modules and forum questions in such a manner that participants would be encouraged to revisit the assumptions they had held about wisdom at the start of the course. The opportunities to revisit these assumptions occurred at both the middle and end of the semester. In the middle, I introduced a module on psychological approaches to wisdom. My intention was that this module would (a) encourage reconsideration of implicit theories of wisdom, and (b) inspire personal reflection. At the end of the course, I asked participants to discuss the role of wisdom in late-life, which was a signal to reconsider their implicit theories in light of new information. In this manner, I replicated the cycle of inquiry and attempted to inspire transformative learning.

Data Collection and Analysis

Overall, there is a "fitness for purpose" (Cohen, Manion, & Morrison, 2011, p. 230) between the research questions and the method of data collection. I collected the bulk of data from online forum discussions that occurred between all participants in Semester 1 and Semester 2 of the course. Included were my field notes, email correspondence with participants, and data retrieved from the post-course survey and interviews. At this point, I merged the data. Figure 3.1 indicates the method and the terms used in organizing data. This has been reproduced from Saldaña (2013, p. 13), who noted that the process is much messier than depicted in the figure.

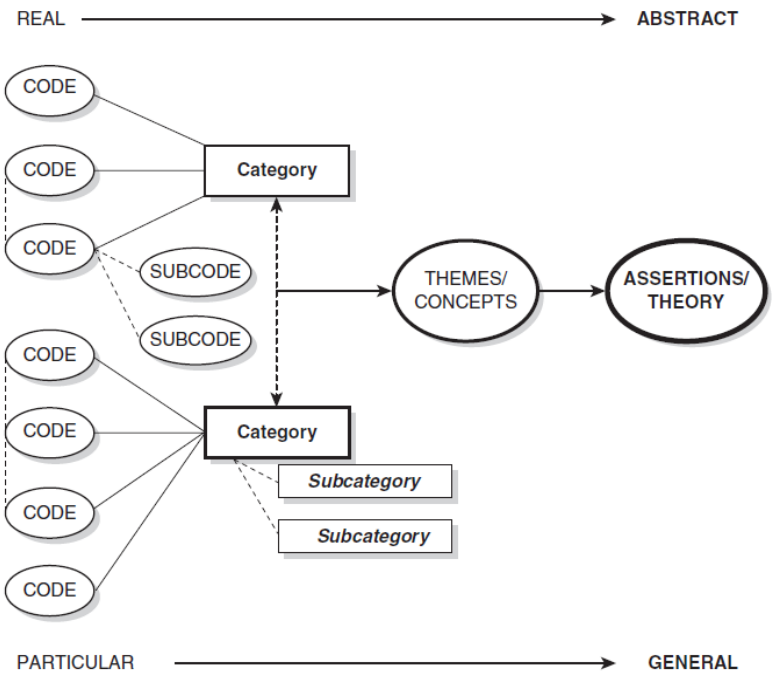

Figure 3.1. A streamlined codes-to-theory model for qualitative inquiry.

Note. From "The coding manual for qualitative researchers" (2nd ed.) by J. Saldaña, 2013, Thousand Oaks, CA: Sage, p.13.

The stages of analysis used in this study are below.

1. The forum conversations among participants, my field notes, and email correspondence served as data. I printed these as double-spaced Word documents. Following the recommendation of Saldaña (2013), I left a wide right-hand margin for writing codes and for notes; I separated the text "into short paragraph-length units with a line break in between them whenever the topic or subtopic appears to change" (p. 17). The left-hand margin had space for "broader topics or interpretive jottings for later analytic memo writing" (Saldaña, 2013, p. 22). Code words and phrases were written out

completely, as Saldaña (2013) advised that abbreviations and reference numbers are too labour-intensive.

2. Following the process of *recursive analysis* (LeCompte & Schensul, 2013, p. 9), I analyzed my data at three different times. These were,

    i. in the field;

    ii. away from the field, immediately after data collection had been completed; and

    iii. after a period of time had elapsed since data collection had ended.

Although taking a break from the data might seem to be counter-productive, Hunter, Lusardi, Zucker, Jacelon, & Chandler (2002) advised that

> it is critical that incubation time be given and that creative skills to achieve illumination be provided. The aha is based on the outcome of the incubation phase during which one is willing to take risks, tolerate ambiguity, and persevere. (p. 378)

After a period of incubation for the data (approximately one month), I returned to continue the task of analysis.

iv. I examined transcripts thoroughly and applied descriptive codes. Descriptive codes aim to "document and categorize the breadth of opinions stated by multiple participants" (Saldaña, 2013, p. 7). Saldaña further noted that descriptive codes are most often nouns or short phrases that capture the topic of a passage (p. 88), and that "Virtually all methodologists recommend initial and thorough readings of your data while writing analytic memos or jotting in the

margins tentative ideas for codes, topics, and noticeable patterns or themes" (p. 21). In this study, the manual descriptive coding was an iterative process that lasted until I could develop no further descriptive codes.

During this step in the process, I also wrote analytic memos. Saldaña described these as being comparable to "journal entries or blogs" (2013, p. 41). A central purpose of the analytic memo is the achievement of "reflexivity on the data corpus" (p. 42). Rossman and Rallis (2003) defined reflexivity as self-examination while trying to understand how someone else makes sense of their world (p. 49).

v. Categories and subcategories were determined for the codes. As stated by Saldaña (2013), some research methodologists "use the terms *code* and *category* interchangeably and even in combination when they are, in fact, two separate components of data analysis" (p. 8). Following the recommendation of Saldaña (2013), I sought categories that were both conceptual and descriptive. This seemed fitting, considering the breadth of the research questions and sub-questions driving the study.

3. The next stage involved searching for themes. According to Saldaña (2013), "a theme is an *outcome* of coding" and not something that is itself coded (p. 14). Rossman and Rallis (2003), discussing the nature of a theme, remarked that (a) it should be written as a phrase or even a sentence, and (b) a theme describes processes that are tacit and subtle (p. 277). This stands in contrast to the code, which is a word that stands for something explicit.

Both deductive and inductive analysis (Charmaz, 2000; Miles & Huberman, 1994) were involved at this stage. The deductive approach allowed for the use of prior knowledge and theory. I looked for evidence of transformative learning, the growth of wisdom, and the development of a community of learners. The inductive approach to data allowed for analysis of how participants understood and expressed their experience. Working inductively, I sought themes that aided in interpreting the phenomena under study.

Emic and Etic Perspectives

Deriving from the participant point of view, the emic perspective demands attention to language used by participants and the subtle cultural nuances. Yin stated, "An emic perspective attempts to capture participants' indigenous meanings of real-world events" (2010, p. 11). The etic perspective, which belongs to the external observer, is the place from which descriptions, analyses, conceptual and theoretical explanations evolve. According to Olive (2014), "the etic perspective encompasses an external view on a culture, language, meaning associations and real-world events" (p. 4). In this research, I considered both the emic and etic perspectives during the analysis of data.

Reflexivity

Throughout my study, where I was both a participant and an observer, I maintained reflexivity by returning to the scholarly literature, making notes regarding nuances of possible meaning, and considering the influence of subjectivity on interpretation. This follows advice provided by Saldaña (2013), who, citing Mason (2002), suggested that researchers should think critically, confront and challenge their

own assumptions, and acknowledge subjectivity in how they research and what they perceive (p. 42).

I maintained contextual completeness by keeping thorough field notes that contained a high level of reflexivity. Gorelick (1989) discussed her own experience of doing this throughout an ethnographic study of anti-Semitism found in the feminist movement. Noting that culture is a process, she advised academics "to confront—not to avoid or expunge but to confront—the biases in one's own perspective, to be in continual dialogue with oneself" (p. 351). Speaking as the researcher in this study, I attest that this approach helped me to explore my biases against non-formal education. Through journaling and reading about credentialism (Collins, 1979; Dore, 1976, 1997), I came to appreciate that my bias could be considered an elitist point of view. I also recognized my bias in favour of older adult learners, which reflects my life experience as a student and my anti-ageist standpoint. Nevertheless, I appreciate that older adult learners cannot be understood as a homogenous group. In fact, it is society's tendency to regard the older adult monolithically (Findsen & Formosa, 2011) that helped prompt my interest in this project. As a result, I was vigilant to recognize the individual voices among my participants even as I searched for harmonizing themes.

Signature and Voice

Conrad stated, "Taken together, issues of credibility, transferability, dependability, confirmability, voice and signature underpin the methodological raison d'être of qualitative research" (2002, p. 43). Of these, voice and signature are the slipperiest elements. They concern how researchers must refrain from imposing themselves upon the data while discussing those under study. Jackson and Mazzei (2009) problematized

the notion of voice in research by noting that the words of research participants are never presented exactly as spoken. Rather, researchers shape the words of those they interview or observe through their power in the relationship. Researchers might also shape the words of participants to better accommodate a research agenda. To avert this potential consequence of my role as researcher, I attended to the advice of Fielding (2004), who suggested a transformative approach to voice. I accomplished this by consciously working in partnership with my participants. In my writing, I strove not to exploit my participants by speaking on their behalf. As suggested by Conrad (2002), I paid attention to "the balance of signature – the type and quantity of imprint that my style insinuated upon the display of voice" (p. 34). My technique for averting an imbalance of signature was by being mindful of the emic perspective while interpreting the meaning behind what my participants revealed.

Ethical Considerations

In considering research ethics in my study, the principle of beneficence dictated decisions. Beyond taking precautions to do no harm, as is described in Canada's Tri-Council Policy Statement (2010), I considered whether my study would ultimately prove useful. I anticipated that results of the study would be helpful to future course designers and teachers. This expansion of knowledge could in turn be beneficial in the future to students taking online courses.

Both at the time of data collection and as I wrote the results I took steps to ensure that the report on this study would not directly or indirectly cause damage to the reputations of the participants. Although online research participants may never be encountered face-to-face, and although they may use pseudonyms, the responsible

researcher will ensure that their anonymity is maintained. Hiding identifying names and locations and omitting verbatim dialogue from published reports are among the suggested methods of protecting research subjects. As stated by Markham (2005), "Search engines are often capable of finding statements used in research reports, making anonymity in certain venues almost impossible to guarantee" (p. 813).

Participant harm could conceivably occur in virtual ethnography through surreptitious observation by the researcher. This is referred to as *lurking* (Brownlow & O'Dell, 2002; Sharf, 1999). In face-to-face ethnography, lurking is known as *covert participant observation*. When researchers fail to identify themselves to those under study, the question of informed consent could be challenged (Hine, 2008). When the virtual ethnographer chooses to observe surreptitiously (for example, with an assumed name or in the role of an anonymous guest), trust that has been established with those under study is put at risk. While lurking might be valued for its ability to "provide detailed portraits of contextualized social realities" (Li, 2008, p. 101), it elicits concern related to the issue of deception. In my research, no harm came to the participants from lurking. I operated in an overt fashion, functioning as a participant-observer. This position allowed for greater familiarity with the context and with the practices of those under study (Hodkinson 2005; Juris 2007).

Informed Consent

Obtaining informed consent was not an obstacle in the course because my participants were members at the online institute where the study was situated. Please see Appendix A for the Letter of Consent. The requirement of membership at the chosen site offered added stability in the otherwise ephemeral world of virtual ethnographic fields.

As noted by Frankel and Siang (1999), the fluidity of virtual communities "complicates efforts to conduct debriefings and follow-up research in order to assess the long-term benefits or harms to subjects" (p. 4).

To protect the research participants from harm I followed ethics procedures as outlined below.

1. Each participant provided Informed Consent before participating in the course and hence in the study. As access to a fax machine or scanner was not available to the participants, all of whom studied from their homes, I accepted an emailed acknowledgement of consent in lieu.
2. In this report, participants were given pseudonyms, and any personal identifiers were not reflected in the gathered data. In all print matter associated with the study, actual names have not been used. I scrutinized direct quotes to ensure that no participants could be linked to identifiers.
3. I did not anticipate that the course subject matter would prompt psychological distress among research participants. Nevertheless, I advised all participants in the Informed Consent that they were free to withdraw from participation at any point, and that at their request, the dissertation would exclude data referring to their participation, up to the point of publication.
4. I have retained my field notes, observations, and analyses in a locked cabinet in my home office. The only other person with access is Dr. Dianne Conrad, my dissertation supervisor.
5. I will destroy these same artifacts approximately three years after the successful defense of the dissertation.

Limitations and Assumptions

Those who were over age 55 and enrolled in this online course on wisdom at a U3A were included in this study. Demographic studies of U3A participation (Formosa, 2014; Zielińska-Więczkowska, 2017) have found that the majority of students (approximately 74%) identify as female and are at least 10 years older than the minimum age for membership. Hence, the population under study is more reflective of a woman's point of view. The size of the total sample group, including both men and women, was dictated by the convenience of participant interest and enrollment.

Conforming to the original WisCom research that I partially replicated, a course of study was offered in online, asynchronous classes. Differing from the original research, completion of the course did not result in a credit toward a degree. In another deviation from the original WisCom research, where the model involved one 12-week graduate course, my study encompassed two iterations of one six-week course, offered within a 14-week period. This was a planned differentiation rather than a limitation. It is acknowledged that in the original WisCom research, the nature of the course (formal, credential-bearing) likely affected student motivation and hence the level of participation. Again, this is not regarded as a limitation of the current study because the objective was to test the model with a population and in a context unlike that used in the original research. Another difference is in the course subject matter. The course offered to participants in my study was proprietary to the research and developed for the research. Again, this was considered part of the differentiation, which followed

recommendations by the original developers of the model. As stated by Gunawardena et al., (2006),

> Evaluation and research results based on one graduate level course support the ability of the design to facilitate social construction of knowledge and perspective transformation. More studies are needed to test the model in different online learning contexts with diverse learners. (p. 229)

Lincoln and Guba (1985) suggested that to enhance validity of findings, a researcher should seek prolonged engagement with participants. The nature of this study precluded an extended observation. I perceive this to be a limitation.

The research proceeded from the assumption that older adult students pursuing education accept the existence of wisdom and that they could articulate their perceptions of this phenomenon through the discussion forum of an LMS. I also assumed that there is merit to the theory of developmental stages as described by Erikson (1993) and transformative learning as described by Mezirow (1978a, 1991). Further, I pursued the research with the assumption that the learning experience of the older adult enrolled in an online class in a U3A is a matter that merits attention.

Another limitation, as noted by Bury (2005), is the researcher/researched power relation, which can interfere with the production of knowledge from research findings. This is a difficult problem to overcome. Although Bury suggests methods of counterbalancing the power imbalance, such as researchers maintaining transparency throughout their time in the field, she concedes that this is only a partial solution. There will never be a perfect representation of the lived truths of the participants.

Speaking of the remembered past in ethnography as a representation of experience, Bury stated that

> Although steps can be taken to (re)negotiate the researcher/researched binary, it is important to acknowledge that it can never be erased. It is the researcher who includes, excludes, arranges and manipulates the "secondhand" memories in order to construct a coherent narrative in which she has material and symbolic investments. (2005, p. 30)

Ageism

I used an anti-ageist lens in order to ensure that prejudicial suppositions regarding the older adult were not applied during analysis. In its earliest use, the term "ageist" was defined as a form "revulsion" and "distaste" for growing old (Butler, 1969). This study has rejected an ageist point of view by refusing to consider older adults and their use of computers as anomalies. Instead, this information is considered valuable data that augments our understanding of computer-mediated study. As observed by Hallet and Barber (2014), online interaction is so much a part of our lives that it can no longer be excluded from the realm of the everyday. This study has proceeded from the position that Internet use among older adults is an everyday occurrence rather than a remarkable activity. Computer and Internet use by older adults is believed to be underreported and underestimated because of ageist assumptions regarding technology use and generational abilities (Bowen, 2012; Czaja, Charness, Dijkstra, Fisk, Rogers, & Sharit, 2006; Lenstra, 2017; Mitzner et al., 2010).

Conceptual Framework

Miles and Huberman (1994) referred to the conceptual framework as an organisation of assumptions, beliefs, and concepts that serve as a foundation to the research. The conceptual framework "lays out the key factors, constructs, or variables, and presumes relationships among them" (1994, p. 440). More recently, Akintoye (2015) stated that a conceptual framework is appropriate when theories already in existence cannot explain or create a foundation for the research. My use differs because this study has a strong, intersecting theoretical undergirding. The concepts that drove this investigation are presented graphically in Figure 3.2.

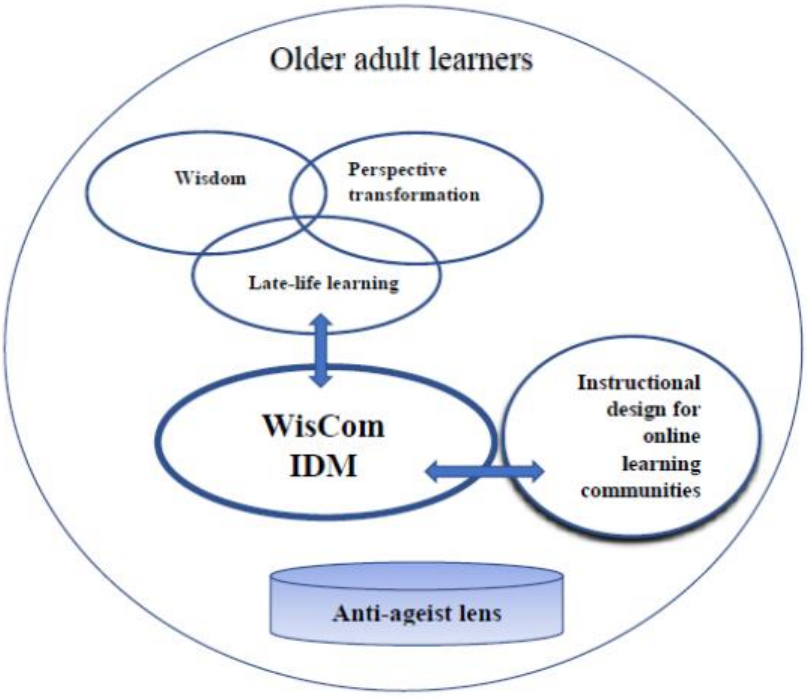

Figure 3.2. Conceptual framework of the Web of WisCom study.

Summary

This study was a differentiated replication (Lindsay & Ehrenberg, 1993; Uncles & Kwok, 2013). Using the WisCom instructional design model (Gunawardena et al., 2006), I facilitated an online course on the topic of wisdom. Following the recommendations of Gunawardena et al. (2006, p. 229), a population different from that originally studied in 2006 was invited to take a course built using the WisCom model. Through a virtual-ethnographic approach to this case study, nuances regarding the development of wisdom in an online learning community were located and described. In that wisdom development, transformative learning, and the WisCom model had not previously been studied in this manner, insights regarding both theory and method were anticipated.

The next chapter will report on what I found through data analysis. These findings relate to the course of study my participants took, to the surveys and interviews conducted after the course, and to the themes that emerged from examination of the course discussion forum.

Chapter 4. Findings

The findings presented in this chapter have been divided into five sections. The first, Online Learning Using WisCom, describes the course of study presented to my participants and relates to how WisCom functioned as an instructional design model. The second section is The Cycle of Inquiry. Here, I present the challenges of working with the cycle in my group of older adult participants. The third section is Implicit Theories of Wisdom Development. This section organizes the folk or embedded theories of wisdom gathered from participant comments. Next, in the section titled Women and Men: Differences in My Course, I provide forum comments from both semesters of my course. These illustrate an incidental finding that contradicts previous research concerning how men and women communicate in an online learning forum. The fifth and final part of this chapter relates to the surveys that were distributed and interviews conducted at the conclusion of both semesters. This has the title Survey and Interview Results. The objective of both the survey and interviews was to elicit perceptions from participants regarding the effectiveness of the course and its design. All participant names have been replaced with pseudonyms.

Regarding the demographics of my participants, of note was their high level of education, the heavy enrollment by women, and their ages, which were on average 22 years higher than the youngest allowable age of enrolment in a U3A. Although the minimum age of membership in a U3A is 55, the average age of my participants was 76. In fact, the youngest participant to respond to my call for demographic information was age 69, while the eldest was 84. Literature on the older adult learner had led me to anticipate that my participants would have completed high school and/or post-secondary education. Discussing older adults and education, Kim and Merriam (2004) stated,

"Previous educational level is the single best predictor of participation in formal and informal educational activities" (p. 442). The higher enrollment in my course by women followed the pattern observed in previous studies of older adult learning (Formosa, 2005, 2014; Zielińska-Więczkowska, 2017). To view demographic information for my participants in table format, please see Appendix E.

Online Learning Using WisCom

The WisCom instructional design model is purported to (a) develop wisdom communities, and, (b) design learning environments for ill-structured knowledge domains (Gunawardena et al., 2006, 2019). Further to this second point, WisCom is intended for use with subjects where domain knowledge is evolving. Gunawardena et al. (2006) recommend WisCom for learning situations when many perspectives and contextual knowledge are critical to understanding a question or solving a problem (p. 219). I offered the online course at a U3A for two consecutive six-week periods. I refer to these as Semester 1 and Semester 2. During the first semester, 11 participants enrolled. Seven of these identified as women. Participation in the course discussion forum was extremely slow at the start. As a result, I emailed a request to participants, asking them to engage in the forum. The reply that I received from those who were inactive was overwhelmingly that they simply wanted to read what others had to say without responding – an activity known as lurking. Jennifer provided a typical response. She emailed me that "I've never been at ease putting beliefs and such down so others can see." The only participant who provided a substantively different response was Liam, who wrote, "Sorry I haven't written anything but I can't think of something interesting to add yet. I've not taken a course here before where that was expected."

Through my own vigorous participation, I endeavoured to establish a tradition of leaving and responding to comments. Most of the participants became moderately engaged, yet seven of them over the two semesters – one man and six women – posted three or fewer comments to the discussion forum. One of the more active participants during the first semester helped me, perhaps inadvertently, by making a complaint about the lack of participation. In a forum, Frank stated, "No offense Lynn but is there anyone else here besides you who is going to comment on this topic?" From this point forward in Semester 1, forum posts from other participants increased.

In the report on WisCom's inaugural use by Gunawardena et al. (2006), there were 1,543 forum posts gathered from 15 students over a twelve-week semester. Although it is unlikely that all students posted an equal number of comments, the average number was 100 posts per student at a rate of 8.33 per week. By comparison, my course using the WisCom model saw 279 posts in the forum over two six-week semesters. Certainly, some participants were more active than others. However, the average number was 1.01 posts per week. Comparing my course to the original used by Gunawardena et al. (2006), there was an 87.8% difference in rate of participation. The significantly lower number of forum postings among my participants could be attributed to a number of factors, including the non-formal nature of my course, my participants' lack of familiarity with the constructivist-learning environment, and perhaps the demographic of those who were enrolled.

Throughout both semesters, my participants did not develop many discussion threads. Overall, they were more inclined to post their own ideas in response to questions I had posed. Unfortunately, I did not have access to course analytics, which would have

allowed me to track participant movement throughout the site. This information could have been useful. When a student visits a course forum without posting a comment, they are lurking, or engaging in non-participatory activity. The paucity of discussion threads indicates that participants largely ignored comments made by classmates. In the first semester of the course, there was an overall lack of collaborative learning. I was unable to discern if there was "a network of out-of-class dialogues among students" (Kearns & Frey, 2010, p. 41). During Module 4 of my course, I encouraged participants to exchange points of view with another trusted classmate before posting comments. This practice is encouraged by Gunawardena et al. (2019). I feel confident that there was some degree of behind-the-scenes discussion. To what extent this occurred, I cannot say.

The exception to this pattern happened when the forum discussions turned to case studies. Case studies garnered the most interest by participants, as measured by the development of threads. In these instances, participants responded to comments made by classmates. Threads of up to five responses formed. That this dialogue occurred as the result of a case study corresponds positively to a finding by Partlow and Gibbs (2003), who performed a Delphi survey on teaching practices compatible with constructivist principles. The Delphi panelists gave the highest ratings to project-based learning tasks, collaborative and cooperative small group work, and activities that require higher-order cognitive skills. As Partlow and Gibbs (2003) remarked, teaching practices most aligned with constructivist principles are those that offer "problem complexity, problem solving and authenticity, and collaboration within the learning situation" (p. 90). Certainly, the older adult learners in my course were most active when tasked with a complex problem

to discuss. For example, John, in discussing the case study regarding the pacifists of Philadelphia, revealed his inability to come to a satisfying conclusion. He wrote,

> On the actions of the pacifists not acting to protect their women from rape, beatings. I think they were immoral. In general this behaviour is contemptible. But then when I add in their belonging to that sect of pacifists I'm not sure. Were the pacifists being wise for themselves? Is that possible?

To this comment, Catherine wrote a response that likewise revealed a lack of certainty.

> The pacifist men thought they were being wise and probably took comfort in thinking they were wise even though what they did was wrong. The pacifist men, did they ask their wives what they thought they should do? If they [sic] wives had told them to fight, what was right and wrong?

If my questions were less demanding – for example, when I asked for an opinion – interest appeared to wane. Rather, questions that were challenging enough to cause cognitive dissonance attracted the most attention. This finding affirms the value of collaborative problem-solving tasks when the goal is to develop a constructivist-learning environment. It also affirms the value of case study as a positive aspect of the WisCom instructional design model.

Throughout both semesters of the course, I deliberately left the discussion forum open from week to week. Participants were able to return to the forum comments from earlier weeks to review areas they had previously missed or had not fully appreciated. Morrison, Ross, Kalman, and Kemp (2013), discussing *learner control* in distance education, refer to this as a *navigation* decision. I designed my course so that participants could read, and if they so desired, respond to older questions and comments, including

those from previous semesters. I did this to honour the intention of the WisCom model, which is to encourage students to utilize knowledge created by the larger wisdom community. Rather than forcing participants to move in lock-step throughout the course, I provided an open forum format so that everyone would have time to reflect, go back, build upon a previous comment, or challenge someone else's point of view.

Gunawardena et al. (2006) did not indicate whether a WisCom discussion forum should close after a module had ended or if it should be left open. Rather, it was simply stated that the instructor should organize the products of group knowledge so that they could be relocated easily later (2006, p. 221). Further, details regarding forum use were not specified in the cycle of inquiry model, which was developed by Bransford et al. (2004), and upon which the WisCom model was partially designed. Nonetheless, given the focus on reflection and the constructivist learning approach promoted by WisCom, keeping the discussion forum open throughout the course struck me as being crucial. The result of taking this approach was most discernable in the second semester of the course, where participants were able to read and comment on posts left by the previous cohort. Rather than starting afresh and building toward an idea, participants began their exploration of a topic where the previous class had left off.

The structure of the course was such that every comment and thread began in response to discussion questions that I had written and posted at the end of a lesson. In Semester 1, the participants simply responded to these questions independently. Outside of case studies, which sparked threads of discussion, the comments were overwhelmingly monologues that voiced opinions. In Semester 2, in addition to these monologues, some participants posted discussion questions of their own. I understand this as evidence that

the participants were moving toward cognitive presence through information exchange and by connecting ideas (Anderson & Dron, 2011; Garrison, Anderson, & Archer, 1999). This was also evidence that participants were moving toward the collaborative construction of knowledge, which is one of the central aims of the WisCom model. Unlike traditional courses, where individual achievement is the goal, the wisdom community strives for collaborative effort toward knowledge development (Gunawardena et al., 2006, 2019).

There are three possible explanations why second semester participants increased their contributions. The first explanation gives credit to the charismatic efforts of one enthusiastic participant. In Module 3 (which concerned the psychology of wisdom), this participant, John, wrote a forum post that was over 1,400 words in length and included a great deal of personal history to illustrate his points. This was not John's only lengthy post. Rather, it is an example of his enthusiasm for sharing. The more frequent contributions of those in Semester 2 could be a result of the precedent set by John.

The second explanation for the increase in participation could be the availability of pre-existing forum contributions on the course learning management system. According to Gunawardena et al. (2006, 2019), one of the benefits of using the WisCom model is that it provides community members with access to knowledge that was developed by previous groups.

The third explanation, which I cannot objectively assess, relates to my performance as facilitator and mentor in Semester 2. It is possible that I was skillful in eliciting more participation as the result of my previous experience in the course. Therefore, the increase in forum comments in Semester 2 may have been (a) the result of

John's loquaciousness, which inspired discussion, (b) the result of the archived Semester 1 forum providing direction and inspiration to the new participants, (c) a tribute to my improved performance as a facilitator and mentor, or (d) all or some of the above.

Another area where the Semester 2 participants outperformed those in Semester 1 was in the length of the posts. In calculating the length of the posts, I first compared both terms and included the lengthier comments of John, whose discussion posts ranged from between 1,478 to 187 words. It was no surprise that the resulting average number of words in the discussion posts provided in Semester 2 was high (136). I also calculated the number of words by eliminating John's contributions, as he was an outlier in his loquaciousness. Making this adjustment, the average number of words per post was (86). Compared to the average number of words per post in Semester 1 (78), Semester 2 still outpaced Semester 1. According to Wise, Zhao, and Hausknecht (2014), online classes in higher education garner forum comments in the range of 100 to 200 words per post. Accepting this range as typical, the length of posts by my participants was below average.

The Cycle of Inquiry

The cycle of inquiry module design used by WisCom (Gunawardena et al., 2006) involves five steps, each of which is intended to move students toward reflection and collaborative inquiry. Students involved in a course that utilizes the cycle of inquiry are anticipated to engage in communication that encourages critical reflection and discourse. My participants engaged in a rigorous exchange of ideas only during discussion of case studies. I sought evidence of developing group cohesion through hints in the forum that participants perceived themselves to be part of a community. Garrison and Akoyl (2013,

p. 108) suggested that inclusive pronouns such as “our” and “we,” when used by students to refer to their classmates, are indicative of cohesive communication. My participants used neither of these pronouns.

In my course, some of the design tasks by necessity deviated from the model suggested by Gunawardena et al. (2006). For example, enlisting mentors from previous cohorts of the course is recommended in Step 3 of the cycle of inquiry (Gunawardena et al., 2006). As there was no experienced participant available the first time I offered the course, I served as the mentor. According to Gunawardena et al. (2006), instructors can also serve as mentors. Despite my requests to both individual participants and to the class as a whole the second time I offered the course, none of the previous participants expressed an interest in serving in this capacity. As a result, I once again took this role. A field note I wrote during this period reads:

> My participants don’t seem interested in acting as mentors. Maybe it’s because there’s no extrinsic reward for taking on this role. In the formal courses that Gunawardena used for WisCom, graduate students volunteered as mentors. They could have expected the favour of their professor, or perhaps job experience facilitating. My participants seem uninterested in this responsibility. This might speak to their attitude (and perhaps the attitudes of all age groups) toward non-formal study. The implicit reward of satisfying curiosity or being challenged may be the entire motivation.

Another deviation from the cycle of inquiry concerned the activity of dividing students into breakout groups, suggested in Step 4 (Gunawardena et al., 2006). In my course, this activity was unsuccessful. In Semester 1, I assigned four pairs and one group

of three participants to work together for four days. At the end of this period, no discussions had occurred, although two participants (in two different groups) had each offered a comment to their team or partner in an attempt to get discussion started. In Semester 1, Jennifer said, “My reaction to the Heinz dilemma is that Heinz probably didn’t think too long before taking action. It was a gut reaction. Not so much wisdom as fear.” Discussing the same case study in a different group, Margaret said,

> My thoughts go to the chemist and his wisdom. What was he being greedy or was he prudent asking for full payment? That point I think about because my family are shop owners, we never gave goods on credit until credit cards appeared because it was almost guaranteed we’d come up short at the month end. The pharmacist could be anguished about Heinz’s wife but smart to put his own needs first.

Although both remarks were objectively interesting enough to warrant a response, the other participants offered none. Observing this lack of participation in small-group activity, I did not attempt the breakout groups again in Semester 2. I based this decision on my finding in Semester 1 that the dynamism of the whole group was the driver of discussion. As a substitute activity for Semester 2, I encouraged participants to exchange their insights and reflections with a trusted member of the cohort via email. Although these exchanges were private to each participant, one individual made the results of this activity public. Catherine stated that

> Email to John was a treat. We talked out the problem of the pirates, both think the pious men were daft fools for letting their wives, daughters, sisters get taken by pirates. They didn’t see their so called moral behaviour was really lack of

thinking a problem through from all sides. Reminds me of some of our politicians here!

Implicit Theories of Wisdom Development

After gathering the implicit theories regarding wisdom as revealed by participants through forum comments, I examined them for patterns indicative of shared beliefs. Concurring with Sternberg (1985), I considered these implicit theories to be useful, authentic, and accurate in self-evaluation. They revealed what my participants understood as wisdom and hence what they valued and enacted as wise behaviour. It was also indicative of the qualities they would appreciate in themselves and others. Four headings organize this aspect. They are: Listening and Wisdom, Experience and Wisdom, and Reflection and Wisdom, and Compassion and Wisdom.

Listening and wisdom. The ancient Egyptian Maxims of Ptahhotep discussed the value of listening as a means of wisdom development. The Jewish mystic Solomon ibn Gabriol, writing in the 11th century about the stages of wisdom development, also referred to the power of listening. By contrast, contemporary discussions and descriptions of wisdom and wisdom acquisition seldom note listening as an important element. Hence, it was surprising to find that the ability to listen well emerged in the forum discussions as being a strong harbinger of wisdom. Equally, participants described listening skill in the forum as a product of wisdom acquisition. Overall, there was acknowledgement by many participants that listening is both a wisdom acquisition skill and a product of wisdom. Supporting the idea of wisdom as a product of listening, Lainie, quoting Doug Larson, wrote, “Wisdom is the reward you get for a lifetime of listening when you would have preferred to talk.” This suggests that silent observation,

executed with restraint, has a beneficial and long-term effect. Nyla mused about how some people talk a great deal but repeat themselves and say nothing new. She wondered if wisdom could possibly develop in such people. She further stated, “Buddhists are not ones to talk much. Maybe listening is the key to wisdom.” Gladys wrote, “You get wisdom by listening to those with experience.” Lori noted,

> You can get wisdom going it alone and hopefully, arriving at a place where you’re wise. Or you can study and read and listen and apply lessons from others. Those lessons are in books and they walk among you. Maybe you show yourself wise when you pay attention to them.

Catherine stated, “Listening to what older people say, and researching it. Asking questions, listening to answers, researching them yourself.” From this perspective, wisdom develops not simply by listening but by following this with fact checking, likely through study and speaking with knowledgeable elders.

Sadhna noted that wisdom is available to those who are willing to listen to the experiences of others and the teachings found within those experiences. However, whether to attend to these experienced others “is the choice of the listener.” This introduces the notion that wisdom is readily available to those who are willing to listen and ready to process what they have heard. Commenting on this topic, Vicky was more succinct. She wrote, “One mouth, two ears as the saying goes.”

From the perspective that being able to listen without interruption is a sign of wisdom, Lou-Anne simply stated, “The wise people are very good listeners.” Deborah took this idea further, adding that the wise will not hoard what they have learned. She wrote, “Wisdom is listening and taking in the information and then passing information

on in discussion." John described a wise relative, noting that his silence was the hallmark of his wisdom:

> Several people have impressed me. Thinking back to the last time I met him, forty years ago, a relative by marriage, in his fifties, struck me as wise. He not only could talk about everything one might talk about. He also knew what to say and when to say it. But what made him wise in my eyes was the way that he knew when to say nothing.

Making a similar point, Margaret referred to evidence of her own developing wisdom by stating that wisdom is "Knowing when to keep my mouth shut."

Experience and wisdom. According to Aristotle in Nichomachean Ethics, Book IV, experience is an essential element in the development of practical wisdom, or phronesis. At least a century earlier, Siddhartha (Takahashi & Overton, 2005) had a similar insight; he said that wisdom resulted from life experience and contemplation. Jordan, a contemporary wisdom scholar, noted that healthy elders, who have a lifetime of experience to reflect upon, possess a wisdom advantage (2005). By contrast, Montaigne (1580/1952) opined that experience has no part to play in wisdom acquisition because wisdom grows through spiritual enlightenment.

Participants in my course frequently referred to the important role of experience in wisdom development. This is in keeping with the findings of Takahashi and Bordia (2000), whose multidimensional scaling analysis revealed that Western participants rate experience, followed by knowledge, as the words most closely associated with wisdom. One of my participants, Sadhna, wrote, "I also think 'wisdom' comes from experience, observation, and learning from the mistakes we make. This trait can't be taught." From

this perspective, wisdom relies upon one's ability to make meaning from the lived past. Sadhna added, "It [wisdom] isn't something that comes to everyone. They don't all have the ability to learn from the past." Mary stated, "I usually associate wisdom with age and experience although I believe anyone can learn from anyone else." This concurs with findings of Staudinger (1999b), who suggested that "age is a necessary (but not sufficient) condition for the attainment of wisdom" (p. 642). Some participants in my study confirmed their belief that experience, and hence age, bequeaths the type of understanding that foments wisdom. Nyla stated, "Young people, they can have an enormous knowledge about whatever subject, but they lack the experience of life. They are not wise." This suggests a belief that the experiences of those who are younger, regardless of their ability to make meaning, will be insufficient for the development of wisdom. Frank wrote, "Wisdom is 'learning' from experiences, some people never learn. They wander aimlessly repeating the mistakes." Frank's point of view is that one requires skill in remembering and reflecting on experience in order to acquire wisdom. John defined wisdom as "Knowledge; facts, information, and skills acquired through experience or education; the theoretical or practical understanding of a subject." From his point of view, a rich life experience could supplant formal education as a means of wisdom acquisition. Making a similar point, Barbara described her grandmother as one who had accrued wisdom through life experience:

> Grandma had a life of experience. She knew, what to do, in any situation. She could advice [sic] younger, the less experienced. She read personalities and she had common sense in practical life and solving problems. Knowledge and insight and life experience made her wise.

Lou-Anne, who had also mentioned listening as a means of acquiring wisdom, added that she perceived wisdom in those who have lived long enough to gain extensive experience. She elaborated and offered her own belief concerning the motives of the wise. In her opinion, the wise are pain-averse and eager to share their understanding of how to avoid discomfort. She wrote,

> The older the person the more they have experienced and in general they can avoid pain and achieve rewards. Most want to tell you about their experiences. They want to tell what they have learned so you will receive rewards and less pain.

Alex suggested that the Serenity Prayer contained the best insight about wisdom. The prayer asks for the gifts of acceptance and courage as one confronts the challenges of life. In this case, experience and wisdom are equivalent, providing one with powers of discernment. The poem reads, "God, grant me the serenity to accept the things I cannot change/The courage to change the things I can/and the wisdom to know the difference" (Anonymous). Jack, equating experience with knowledge, was succinct. He wrote, "Wisdom is the use you put your knowledge to."

Reflection and wisdom. In Nichomachean Ethics VI, Aristotle stated that phronesis, or practical wisdom, evolves from time spent in reflection. Many years later, the contemporary wisdom researchers Bluck and Glück (2005) came to a similar conclusion by studying implicit theories of wisdom. According to Gunawardena et al. (2006), the WisCom model "combines the cognitive, affective, and social dimensions of learning to create a learning environment that fosters reflection, sharing, knowledge innovation, and transformational learning" (p. 229). Reflection is understood to share a role in both wisdom development and transformative learning.

In my course on wisdom, Frank wrote, “Wisdom comes through reflection and application.” Emma remarked on the role of reflection when processing negative experiences. She wrote, “I think wisdom comes from experience, observation, and learning from the mistakes we make.” Jack, adding his voice, wrote, “Today nobody takes time to ponder what’s going on around them. So it figures the same ones go through existence not acquiring wisdom.”

Lou-Anne stated her opinion that “Wisdom is finding out what you should have done in the first place.” This statement calls to mind Schön’s reflection-on-action (2017). This type of reflection involves contemplating actions completed, realizing what knowledge motivated those actions, and then analyzing the entire episode. Those who successfully reflect on action will deliberate about what might have contributed to a different outcome. Describing her experience, Sadhna wrote that the process can be delayed. “I think back sometimes on things I have done or was involved in and still I can learn, even if the thing happened years ago. For me, any wisdom comes over time in this way.”

Compassion, empathy, and wisdom. Bloom (2016) described empathy as the ability to feel another’s pain acutely. Compassion, she maintained, is a healthier emotion, as it provides an understanding of others without the danger of falling prey to their distress. Wisdom scholars (Bluck & Glück, 2005; Kunzman & Baltes, 2005; Sternberg, 1998) have noted that empathy and a sincere concern for the well-being of others is emblematic of the wise. Examining compassion from the perspective of transformative learning, Courtenay, Merriam, and Reeves (1998) identified an increase in compassion among those who experience perspective transformation. Research by Ojo (2010) on

transformative online education showed that transformation can be seen not only as a way in which individuals change their perspectives but also as a way they can develop an awareness of other points of view. This suggests that perspective transformations experienced through online learning can result in compassion and empathy.

Semester 2 participant Lainie alluded to an experience earlier in life had left her with posttraumatic stress disorder (PTSD). Her belief was that living through the pain had taught her compassion for others. In equating wisdom with compassion, she wrote, "Sometimes the price of compassion is high, but the lack of it would be unbearable." Nyla held a different opinion. After stating that compassion is a component of wisdom, she added, "I also think of compassion as part of reason. A balanced mind is an enlightened mind." Lori held a similar point of view yet understood the relationship between compassion and wisdom differently. She wrote, "Wisdom is found in its fruits. In unexpected compassion. I think this is a fruit of wisdom."

In discussing compassion, Catherine described how her unconventional, agnostic grandparents were formative in her understanding of wisdom. Their approach to life caused her to think critically from an early age. In adulthood, she made use of their influence when she worked with international newcomers to her home city. She wrote, "I get my wisdom from my grandparents. They instilled acceptance of our differences and compassion for other people." For Catherine, compassion operates as a virtue that is complementary to wisdom. Mary appeared to understand selflessness as an instructive and self-regulating quality of the wise. She wrote, "Selflessness is wise. It teaches humility and empathy. It helps us realize it's not all about ourselves."

John described his belief that a cluster of qualities, realized within one person, was the source of wisdom. Compassion, although essential, was only one fragment in this cluster. He wrote, “In my opinion, characteristics necessary for wisdom are self doubt, compassion, and patience. Being honest and kind. Questioning the reasons motivating thoughts and actions. Patience means developing a wait and see approach. Not jumping to conclusions.”

Lou-Anne did not use the words “empathy” or “compassion” directly, yet she alluded to them by writing, “Our actions are most important. How we show love, how we express how we care with friends and family. That’s my interpretation” [of wisdom]. Frank did not provide a description of wisdom; rather, he provided his observation of those whose lack of common decency prevent wisdom from manifesting. He wrote, “I can’t say that I know how wisdom develops. I do know it doesn’t come with age. I know people who lacked empathy and self analysis when they were younger, and now they’re still assholes.” Lori, contradicting this point of view, stated her observation poetically. Alluding to how the least sophisticated people can surprise us by demonstrating fine qualities, she wrote, “Wisdom is found where least expected, like a spring welling from the earth.”

Women and Men: Differences in My Course

Before I enlisted my participants, I anticipated that there would be a higher representation by women than by men. Earlier studies of older adult learners (Formosa, 2005, 2014; Zielińska-Więczkowska, 2017) indicated that men enroll in classes far less frequently. This observation was borne out in my course, where the number of women was significantly greater than that of men. Although the intent of my research was not to

identify gender differences in understandings of wisdom or in course participation, there was one incidental finding regarding gender that struck me as noteworthy. In both semesters, I found that the men were more forthcoming about their personal life histories and used these to illustrate the points they were making. The result was that I knew a great deal about my male participants simply by reading their comments. By comparison, with a few exceptions, the women were discreet about their backgrounds. Overall, their remarks seldom revealed information about their personal lives. Their responses to the forum questions were often provided as platitudes, quotes from famous people, or made in the second or third person, as if they were trying to remove themselves from their opinions. For example, after Module 2 in my course, one of the questions directed to participants was "In your opinion, what characteristics are necessary for someone to develop a wise personality?" Margaret, from Semester 1, said, "When you're on your deathbed, what you wish you would have said and done and left unsaid and undone. The characteristic of having few regrets is a sign of being wise." Another woman in Semester 1, Jennifer, stated, "You get wise by being open to experience. Or you get wise by listening to people who have experience. Or you get wisdom going it alone, reading, studying, listening and you apply the wisdom of those who went before you."

By comparison, a man in the same semester, Jack, began his response to the same question by stating,

> Fifteen years ago I was minister to some inmates. I said something to them about wise characteristics, and the story I told had to do with a street brawl. And this is something I've said before on account of my having been involved in martial arts.…

Following this came an anecdote that provided both an answer to my question and an insight into the respondent's personal life and his character. Another man in Semester 1, Frank, answered this question by revealing his identity as a recovering alcoholic. "My best source of wisdom is from my AA 12-step program. It shows me how to live and to give back. Above all I try to be honest to others and to myself."

There was no difference in this pattern during Semester 2. Again, a question posed after Module 2 was "In your opinion, what characteristics are necessary for someone to develop a wise personality?" responded, "You come by wisdom by listening quietly to those others who have gone before and experienced the world." Catherine said, "Listening. People who talk too much can't hear what other wiser folks have to say." John responded, "In my opinion, characteristics for wisdom include patience, not jumping to conclusions quickly, humility, selflessness, being good as a listener. In my life, I haven't perfected any of these, but I had a role model to learn from for many years. Odd I know, it was my mother-in-law...." As with Jack in Semester 1, John continued to relate a story that was both autobiographical and illustrated the point he was making about wisdom. Alex, also from Semester 2, said, 'Any wisdom I might have will be ascribed to my upbringing as a Christian and a nine-decade lifestyle of the application of the Word of the New Testament. My character is a result of living as a Christian."

The intimacy of the men's responses as compared to those of the women was unexpected, especially because Li (2006) and Li and Kirkup (2007) observed a different trend in their research. While they found that men and women engage differently when commenting in online forums, they suggested that women were more personal, while

men preferred to simply exchange information. Similarly, Morante, Djenidi, Clark, and West (2017) found that online "patterns of engagement for women tended to be personal, task oriented and collaborative" (p. 270). My finding that the male participants were overall more forthcoming about their life stories may suggest that older adult learners respond and comment differently than do their younger counterparts in online settings. Noting that adult learners might feel overwhelmed when first introduced to online learning, Yoo and Huang (2013) recommended that institutions offering online adult education "need to provide robust and comprehensive instructional support programs to scaffold these novice learners through at least the first year of course work" (p. 160). This assistance was not available to students at the U3A where I performed my research.

Survey and Interview Results

I sent out surveys within the first week after the end of both semesters. Of the 23 surveys sent through Survey Monkey, 11 participants in total returned theirs after a reminder follow-up message (47.8%). Six participants after Semester 1 and five participants after Semester 2 responded. As the surveys asked for comments in response to open-ended questions rather than responses to multiple-choice answers, this was considered a good return. As noted by Reja, Manfreda, Hlebec, and Vehovar (2003), online survey questionnaires with open-ended questions can yield a lower response rate because of the perceived effort that will be required to prepare answers. As an endorsement of the method despite the potential for low return rates, they noted that open-ended questions on surveys allow researchers "to discover the responses that individuals give spontaneously" and "avoid the bias that may result from suggesting

responses to individuals" (p. 159). As I was searching for spontaneous, unbiased responses, I chose this format.

Gunawardena et al. claimed that a cyclic, symbiotic relationship between change and deeper understanding occurs to students who are involved in a course that uses the WisCom instructional design model. "Wisdom and transformative learning beget one another, creating a virtuous circle of growth and insight" (2019, p. 144). As regards transformative learning revealed through perspective transformation, I followed the advice of Gunawardena et al. (2019) and searched for comments reflective of newfound confidence, curiosity, surprise, dissonance, and shifts in perspective. Beyond my scrutiny of the forum comments, I also examined responses from the survey and interviews. Gunawardena et al. (2019) provided an outline of what facilitators should look for in order to discern whether transformative learning is taking place within an online classroom. Using this as a guideline, I examined my data and sought evidence of change among my participants. The expressions indicative of transformative learning, provided by Gunawardena et al. (2019), are as follows:

- Confidence: Includes statements such as *I feel more prepared… , I feel empowered to… , I feel more confident in my ability to…*
- Interest and Curiosity: Includes statements such as *I didn't expect to… , I want to learn more about… , I'm excited to continue…*
- Surprise: Includes statements such as *I didn't expect to… , I didn't realize… , I wasn't aware that…*
- Dissonance: Includes statements such as *I struggled to understand… , I wasn't able to see how… , I'm confused by…*

- Shifts in Perspective: Includes statements such as *I'm starting to look at things in a new way… , I hadn't before considered….* (p.147)

Survey. Below are (a) the questions I asked in the survey and (b) an overview of the responses. Survey responses from both semesters have been merged.

1. What is the reason you decided to take this course? For example, was there some piece of knowledge you hoped to acquire?

Five participants who responded said that they had decided to enrol in the course for reasons related to curiosity. This was indicated by the responses "want to know more on the subject," "interested about wisdom," "curious," "course title got my attention," and 'Couldn't resist. Looked like my cup of tea." Three responses related to filling a cognitive gap, as represented by the answers, "I thought it was something I should know about," "it's a topic I've tried to talk about but needed more information," and "I'm in need of more education." Both categories – curiosity and a perceived need to fill a cognitive gap – correspond with two of the four strongest factors found in Bynum and Seaman's (1993) survey of motivations for participation in a Learning in Retirement Institute. Relief from boredom was another reason for enrolling, as represented by the responses, "nothing else to do," "look[ed] like a way to fill time." Another response, "I need to develop my own wisdom," could be understood as comparable to Bynum and Seaman's (1993) category termed *drive for self-actualization.*

Question 1 had two parts. In the second half of the question, I invited participants to elaborate on what type of knowledge they had hoped to acquire from the course. Only three participants answered the second part of the question. One participant who answered had enrolled to obtain specific information. What they hoped to learn was

"about the great thinkers." A second participant, claiming to want both information and impetus for reflection said, "wisdom, spirituality, maybe something deep to think about." The third participant who responded claimed, "I wanted to stay away from the telly" (television). I consider this motivation to be self-actualization because the tacit reason for enrolling in the course was to avoid wasting time through passive leisure.

2. At what point during this course did you feel the most engaged or interested, and why?

Six of the respondents claimed the most engagement during the case studies. In reference to the first case study presented, one reply was "The story of Heinz and his situation was a puzzler. I thought long and spoke to my son. Rang him up." A similar response was:

> When we discussed Kolhberg. I studied Kohlberg back at the uni when I took some night courses. Same story. I don't remember having such a hard time coming up with an answer then, being a younger man and all. Good to think on it and hear what others have to say.

Another answer to this question was "Getting out my ideas about the chemist who wouldn't give over the drugs for the dying woman." Another respondent, answering similarly, said, "When we talked about the medicine being stolen" [Kohlberg's 'Heinz Dilemma'].

The second case study also resonated with some of the participants. One response was "The bit about Captain Kidd and his pirates and being so horrid to those women. They were probably treated as whores afterward. All of it made me annoyed." Another

participant stated, “I didn’t like reading about the pirates much. I must say, though, that’s the part I remember best.”

Two participants referred to other course modules as engaging. Their responses included “Learning the psychological take on wisdom,” and “Confucius interested me. I hadn’t known about his career failures.” Another participant claimed, “That was a good course! All of it!” Two other participants responded that they had felt engaged by the social interaction the course provided. They stated, “I liked conversation parts,” and “Reading what people said and then maybe giving my point of view.”

3. Do you believe that any of your thoughts, opinions, or assumptions have changed as the result of this course on wisdom? If yes, please share the details (for example, what has changed and why do you believe it has changed?

Five of the participants answered “Yes.” I included another response as being positive even though it was not as emphatic. The participant simply answered, “Maybe a little.” Only three of the five positive responses included information about why they had changed their thoughts, opinions, or assumptions. Their comments were “I learned alot [sic] about wisdom. Maybe I’m wiser that [sic] I knew,” “Thinking about Heinz and the drugs for his wife, yes,” and, “If the story on Hynz [sic] and the chemist is true, I’ll never trust them [pharmacists] again.”

Of the six participants who answered “No” to this question about changes of perspective, two stated why. Their answers were “I’m not easily swayed in my opinions, so no,” and “No assumptions like you call them changed. I assume nothing at my age.”

4. Some courses are easier to follow than others because of the way the lessons flow. Please describe your opinion of how the lessons in this course worked together.

One hundred-percent of the respondents claimed to be pleased with the flow of the lessons. Responses included “It was easy to follow. No issues,” “There were [sic] lots to learn. I wish they [sic] were more,” “Good class,” “Will there be another? Only I would sign up if there was another course on spirituality and wisdom,” “Wouldn’t change much if anything,” and, “If your [sic] asking about the length of the lessons, I found them just about right.”

5. Please provide any other remarks that might help me to understand your experience of this course of study**.**

Although only three of the participants replied to this part of the survey, their remarks were instructive. One participant claimed,

I learned a lot about wisdom in this course. I learned a lot about philosophers. It was good to learn about these sorts of ideas because I didn’t get to finish school proper. Maybe I’m a wee wiser for taking this course.

Another participant wrote, “The lesson on Heinz and the dying wife was hard to figure out. I thought it out and think it was good for my brain.” As an indication of aroused curiosity, which might signal a pending perspective transformation (Gunawardena et al., 2019), another participant said, “It was the most interesting of courses. Academic but not dull.” The implied reason behind this opinion was that a course with scholarly content was expected to be boring. Consequently, I also recognize

this response as falling within the category “surprise” (Gunawardena et al., 2019), which can be indicative of a transformative learning event in progress.

Interviews. In order to proceed with interviews, I emailed participants immediately after the last class in their semester. In this email, I invited them to share their phone numbers or Skype addresses if they would welcome an interview. All who responded provided a phone number. In total, I collected 10.

My purpose in performing the interviews was (a) to reiterate the questions from the survey, (b) to probe for more detailed responses, and (b) to speak with participants who might not have responded to the survey. Six of the participants I spoke with offered that they had also responded to the survey. Three said nothing about the survey. In the interest of preserving anonymity, I did not press them on this point. One participant, unprovoked, apologized for having failed to return the survey, saying she thought it “looked too long to fill out.”

1. What is the reason you decided to take this course? For example, was there some piece of knowledge you hoped to acquire?

As was found with the survey responses, the interviewed participants claimed that curiosity had largely inspired them to join. Unlike the surveys, in which they had alluded to only one motivation for joining, six of the participants in the interviews indicated more than one motive. For each of these responses, curiosity was one of the reasons for enrolling. Two participants said that curiosity and boredom were motivators. In addition to curiosity, Liam said he was “spending too much time staring at my feet, waiting for my next meal.” Frank said, “it’s that I was interested to find out what there is to know about the idea of wisdom. That and being sick of my daughter telling me to find an

interest if I'm bored." Another participant, Jack, indicated that both a need for social contact and curiosity had inspired him. He said, "I've been a wee bit bored and lonely, to tell the truth, since my wife passed. The teachers at the classes are always pleasant to email with. That and wanting to know about wisdom, those made me register." A participant named Emma claimed to have several reasons for joining the course: wanting to do something in tandem with a friend who was also enrolled, curiosity, and the desire to make use of some new technology. She said,

> My first reason was getting a new laptop on my birthday and wanting to use it for more than playing cards. Then of course, I've a friend who's staying with her daughter away for half the year. And she said it would be nice for us to take the class together. Something to talk about later on. I've taken others here before [other classes at the institute]. It's pleasant. I expected your input [as facilitator] and then the other students had a go in the opinion forums. That was interesting. I didn't expect that.

Emma's surprise with the discussion element of the course could be indicative of a change in perspective.

Barbara alluded to self-actualization, as well as curiosity, as a motive for enrolling. She said, "I liked the name of the course. It caught my interest. It got me wondering what it was all about. I also like being able to talk intelligently to my granddaughter. She's going in for medicine. Smarter than me, I'll tell you. I want to keep up with her."

Sadhna referred to both curiosity and guilt about being inactive as her motivators. She said,

> Oh, I don't know. It was an impulse choice. I always say I'm not going to take another, but then I do. Can't help myself wondering what I'm missing. It's a love/hate relationship. I love to learn, but I'm lazy. Then I hate myself for being lazy, so I take another course.

Two participants claimed curiosity and the ease of access afforded by the Internet as reasons for wanting to join. Lin commented, "I feel I need to know more, and then it's not much bother on my computer. Nyla said, "It's a pain to keep going to the library for heavy books. This [studying online] is a right sight better way to keep the mind up." As their reasons for registering in the course, two other participants attributed a motive that could be categorized as self-actualization. One of them, Jennifer, also alluded to the health benefit of learning. She said, "I think it's important at my age to be involved in something outside the day-to-day business of keeping house and so on. If I've nothing on-the-go, like a course, I start to feel down." The other participant, Deborah, said, "It makes me feel more myself to be in a class. That's one part. I think friends and family enjoy my company more. More when I've been using my brain and learning new things."

The second part of the first question inquired if there was some piece of knowledge the participants had hoped to acquire by enrolling in the course. Seven of the participants simply referred to wisdom as the general topic of interest that had attracted them to the course. Three participants answered in more detail. Frank stated, "I thought I'd learn about famous philosophers. Surprising that nobody I thought would be in it was covered. They never came up in the course. The names you gave were all new." Nyla said, "I believe I said it on the questionnaire [the post-course survey] you sent out. I've always

had an interest in matters of spirituality. The course didn't go there too long, but it was interesting nonetheless." Jack said,

> When I was young, I used to read philosophy and such. I read philosophy for a year at university. Having a family and a job, well. It took up so much time. Now I'm retired, I can follow up my interests in that area.

2. At what point during this course did you feel the most engaged or interested, and why?

Seven participants – the majority of those I interviewed – referred to case studies as points in the course that affected them the most. When asked why, Jennifer said, "It was more interesting than just being given the answer, right or wrong." Referring to the dilemmas faced by the characters in the case studies, Barbara said, "It wasn't like – there wasn't a clear answer for them. I could have answered in any number of ways." Liam said that the case study questions, "Reminded me of a time when I had to make a hard choice. It's not dead easy to make the right choice every time, no matter what some will have you believing." Jack said that he "liked the discussion about the choice Heinz had to make about the medicines." Frank said, "I didn't agree with most of the opinions. About the chemist and Heinz, you know. But I enjoyed putting my oar in. I wasn't about to slack off when everyone was having a go."

Overall, these responses indicate that the participants were challenged, intrigued, and interested by the discussion of the case studies. According to Gunawardena et al. (2019), evidence of perspective transformation is found when students express these responses to a course of study.

Lin referred to several parts of the course that she had enjoyed. Commenting on one of the case studies, she said, “I still think about the story of the pirates. The men that followed their religious beliefs. That part, I’m stuck on. Maybe we have to think for ourselves more and not let our religion do the thinking.” When pressed about why she had not brought this up in the forum, she responded,

> Nobody said anything like that in the class [discussion forum]. I didn’t think on it until later – when the course finished. I may still learn something on my own. Thinking about things like that takes time. Does for me, any road.

Following Gunawardena et al. (2019), Lin’s revelation that she was still “stuck on” the dilemma presented in the case study is indicative of Gunawardena et al. (2019) identified as cognitive dissonance. Lin’s claim that she needed time to process the information implied that a shift in perspective, possibly leading to transformative learning, was taking place after the course had concluded.

Emma said that she had felt most interested during Module 3, which concerned contemporary psychological perspectives on wisdom. According to Staudinger (1999a), personal wisdom is insight about oneself that comes from self-examination, reflection, honesty, and the ability to accept criticism. General wisdom, which is easier to acquire, involves insights about life that can be applied to others. Those who possess general wisdom are recognized as having judicious characters. Referring to this module, Emma said,

> The part I enjoyed most and remember best is the difference between personal and general wisdom. Personal wisdom is rare, I expect. It’s the source of a lot of problems in relationships, I expect. I don’t know how to say this exactly, but I

> wonder if a lot of problems that send people to the psychiatrist aren't the result of a lack of personal wisdom.

Deborah also claimed to find this part of the course to be the most interesting. She said,

> There being different types of wisdom is something I read about in the past, but in the class, it's explained in a way – it's easy to understand. Even though I don't reckon myself as a wise individual, I do get asked more times than not for advice. Even by strangers. It's a peculiar skill, or maybe I attract sad people. So, I think now I might have the second type of wisdom, the general type, without necessarily being personally wise. So that's cleared a puzzle up for me, you might say.

Two participants referred to the module on spirituality and religion as being the most engaging. Nyla said, "Learning about wisdom and religion fit right in with my World Religions course." Similarly, Sadhna stated that she was pleased "to learn different points of view on religion. Some won't have it. But I'm not one."

3. Do you believe that any of your thoughts, opinions, or assumptions changed as the result of this course on wisdom? If yes, please share the details (for example, what has changed and why do you believe it has changed?)

I probed for information about changes the participants had experienced as the result of the course. Most of them did not feel it had led to significant personal insights. For example, when I asked Lin, she claimed, "I think I picked up a few ideas about how hard it is to make a hard decision. There are lots of details you have to consider." When probed for more information, she said, "It was interesting all through. The course was more interesting than the comments. I gave up on reading those." Liam said that he had not been interested in sharing his opinions with others throughout the course. He

claimed, “Nothing to say that I wanted feedback on. Nothing against the others [participants in the course]. Just not something that interests me.” When probed about why he felt this way, he said,

> I’m unlikely to change my mind on anything. There’s naught that I want to tire myself bantering about. Courses are good for keeping my mind alive. Arguments on the Webs—too much grief. I’ve a wife to argue with. That’s enough.

Jennifer said, “Maybe if we’d more time I’d have learned more. It was an interesting course. Yet my opinions and such? Nothing changed that I’m aware of.” When I probed for more detail, Jennifer relented somewhat and indicated that Kohlberg’s Heinz Dilemma case study had caused her to amend her understanding of what constitutes right from wrong. According to Gunawardena et al. (2019), this response could be interpreted as a shift in perspective preceding a transformative learning event. Nevertheless, Jennifer was doubtful that this insight had affected her behaviour. She said, “I might feel different now when I tell my grandson stealing is wrong. Then I don’t think I’ve changed my mind so much that I’d tell him stealing is wrong but depends on the circumstance.”

Deborah, who claimed to have answered in the negative to this question on the survey, stated that she had somewhat changed her mind. She said,

> I never gave wisdom much thought before this course, you know. Now that I’ve taken your course, I find myself catching myself measuring as what I say and wondering if it’s wise, and doing the same when I hear others speaking, or talking about what they’ve done. That’s all new. I suppose that I’ve learned something new, only I can’t put a finger on it just as yet.

As was the case with Lin, Deborah appeared to be still processing information at the conclusion of the course. Following the guidelines offered by Gunawardena et al. (2019), this could be indicative of a burgeoning change of perspective.

In her response, Emma referred to one of the case studies. She said,

> I don't think any assumptions changed like you say. I was interested in what others thought about that man [Heinz] and his wife who needed medicine. I can't imagine what road I'd go in that bind. So, I didn't add anything [to the discussion forum].

Another participant, Nyla, agreed that the case studies had a lingering effect. When probed for explanation, she said,

> Because I couldn't read it and then put it out of mind right away. Like other parts of the course. Not that I've forgotten it all. Only some of the information was facts, like history, and it was interesting. I'm not saying the course wasn't interesting, or unmemorable. Only that part about what you call it, the Heinz and chemist dilemma? It was like a question with no right answer.

The notion of being undecided about how the dilemma presented in the case study should be resolved suggests that both Nyla and Emma were experiencing cognitive dissonance after the conclusion of the course.

Four other participants claimed not to have had any changes in thoughts, opinions, or assumptions because of the course. Of note is that these four participants were all from the first semester, when the forum comments from a previous cohort were not available to peruse. Jack said, "All of it was interesting. Nothing stood out as better or worse." Sadhna said, "I was never at any point more engaged than others. Curious, yes. I was curious about many things in the classes." Barbara said, **"**You'd have to ask my mister if

I've changed. Not that I've noticed." Frank said, "Naw. I'm more set in my mind now than ever." When probed for more detail, he said, "I think I'm too old to change. You don't get to my age unless you're stubborn."

4. Some courses are easier to follow than others because of the way the lessons flow. Please describe your opinion of how the lessons in this course worked together.

Overall, the participants were polite and vague in their responses to this question. They praised the course and stated that it had been interesting. None of them mentioned that the modules contained questions that required them to go back and reflect on their previous learning. If this recursive element had been apparent to any, they did not mention it during the interviews.

When probed, most of the participants spoke about their experience of using the forum. Six expressed some degree of discomfort with writing comments. Barbara said,

> It was a bit of a hard go for me to put together something to say, so quick and all. With some of those questions, I was on-the-spot, if you know what I mean. What I wrote, I'm not even sure it made sense.

Liam responded succinctly by stating, "I don't much like sharing my ideas with strangers." On a similar tangent, Lin said, "Writing comes hard for me. I worry about putting things down so as they look right." Emma stated, "I spent far too much time checking my grammar. You forget it when you're out of practice." Jennifer complained that her "arthritis was up from my fingers to my wrists from working on comments. I do pick and hunt typing. After an hour, I'm glad if I've got down a few sentences. Then I need to rest."

Deborah spoke of previous classes she had taken, and of never before having had, "the opportunity to put in my two cents' worth. It was a nice change from other courses, but I found it – frightening isn't the right word. I found it maybe intimidating at first." When I probed on this point, she said,

> Likely my parents instilled this in me. Father was a headmaster. He always had the final word, and I was instilled to be respectful. I wasn't to speak out of turn at school. I realize how daft that must seem, given I have grandchildren and all. I was always a good student, and that meant minding my schoolmistress or professor when I was matriculating.

Three of the participants responded by indicating that they wished the time to complete each module had been longer. Jack said, "The course went fine, but it seemed too fast. I would have liked more time to work out the ideas, and to have more information." Nyla opined that she had been somewhat overwhelmed by "the fast pace." She also said that any one of the modules, "could be a course in itself." Sadhna responded similarly, stating that she "got interested in the psychology module and wished there was more."

Frank claimed to have no opinion on the matter.

5. Please provide any other remarks that might help me to understand your experience of this course of study.

To this question, most participants answered with expressions of thanks for the course. Four participants provided comments that elaborated on their experience. Barbara said, "I'm going to start reading up on wisdom. Now I've a taste of it, I want more." Barbara's desire to learn more about the topic of wisdom is a signpost that she was

experiencing a shift in perspective (Gunawardena et al, 2019). Jack said, “The course was hard for me. At first, all the yarns and yabbering [comments] on the site were a surprise. Now I recall it, I quite liked it.” As was the case with Deborah and Lin, Jack suggested that he was continuing to process his learning after the conclusion of the course.

Jennifer spoke of other courses taken at the institute, stating that online discussion had not been supported or encouraged. Voicing a similar insight, Emma said, “It’s always, or most of the time, answering questions right or answering questions wrong until you get the gist of it.” Frank voiced an appreciation for the course yet expanded in his answer to complain about his classmates. He believed that some had interfered with his ability to express himself. As a result, he recommended that participants should have exclusive, one-on-one discussions with the course facilitator only. He said, “Better if a teacher and student could have a conversation on the website without all the other voices chiming in with their own axes to grind.”

Summary

Throughout Chapter 4, I organized my findings into five sections, drawing data from my facilitation of a course I had developed using the WisCom instructional design model. The first section described what I observed as a facilitator. From these details emerges a portrait of my participants, who were unfamiliar with and hence tentative in participating in a collaborative, constructivist learning environment. The second section described the cycle of inquiry module design and how I applied it to my course. The third section concerned evidence of wisdom acquisition, which is an intended outcome of using the WisCom model. My participants shared their implicit views on wisdom, which

were useful in understanding what they valued as wise behaviour. In the fourth section, I detailed the incidental finding that there was a significant difference in how men and women presented themselves in this discussion-based course. Contradicting the findings in previous studies, the men revealed personal information much more readily than did the women. The fifth and final section of this chapter recounted the results of both the surveys and interviews I conducted at the end of each semester.

Chapter 5. Discussion

The virtual-ethnographic case study discussed in this paper explored a community of older adult participants while they studied online using the WisCom instructional design model (Gunawardena et al., 2006). I followed two related lines of inquiry. The first concerns WisCom, which provided a framework for the online course I facilitated at a U3A. I discuss how WisCom functioned with my older adult participants and if it functioned as purported by Gunawardena et al. The second line of inquiry concerns the transformative learning and wisdom development experienced by the course participants. I analyzed the remarks made in course discussion forum, emails, surveys, and interviews, looking for evidence of wisdom development and perspective transformation. These data provided better understanding of the wisdom and transformative learning that Gunawardena et al. (2006, 2019) posited as outcomes of online courses that use the WisCom instructional design model. The preceding chapter, Findings, has informed this discussion, and extrapolations are based on this knowledge.

Five themes will serve as headings throughout this chapter: The WisCom Model and Non-formal Learning, The Cycle of Inquiry and the Spiral of Inquiry, Finding and Defining the Wisdom Community, The Older Adult Learner and WisCom, and Wisdom, Perspective Transformation, and the WisCom Model.

The WisCom Model and Non-formal Learning

During Semester 1 of my course, there were 112 participant comments in the LMS discussion forum. During Semester 2, there were 167. Although there were in total 279 forum posts by participants throughout the two semesters of the course, this was far fewer than hoped for at the outset of the project. By comparison, the original WisCom course, which ran for 12 weeks with 15 students, garnered 1,543 student posts.

Gunawardena et al. (2006) did not provide a breakdown of how many posts per person were provided, but as an average, this would be over eight posts per person per week. In my course, the average was just slightly over one post per person per week.

Putting aside other variations (different subject matter, different participant personalities, the different levels of interest roused by the questions), one important difference between the course offered by Gunawardena et al. in 2006 and the one that I offered was assessment. The original WisCom course awarded grades for participation in the discussion forum, whereas my course was non-formal. The only reward my course offered for participation was the possibility of pleasant interaction through discussion. Although I made every effort to engage the participants through one-to-one emails and my own contributions to the forum, participation was low.

It is possible that the non-formal format of my course was responsible for the scarcity of discussion. Evidence supports this proposition. Gafni and Geri (2010), while studying a graduate class, found that students failed to participate in collaborative learning unless they were required to respond to two posts made by other students each week. Lee (2012), in research involving undergraduate students, found that those who were required to participate in discussion posted comments in forums on or close to the final date for contributing. In other words, they responded under duress, and at the last possible moments.

I considered the possibility that class size caused the scarcity of discussion. After searching for evidence to support this notion, I concluded it was unlikely that my class sizes over two semesters – 11 and 12 participants respectively – had an adverse influence on participation. In 2001, a Pew study was published concerning innovations in online

learning. The author of the report, Twigg, found leading institutions that exclusively used the Internet for course delivery aimed for an average target of between 9-25 students per class. Their rationale for keeping the numbers in this range was so that class sizes would be low enough to foster community and stimulate high participation. Tomei (2006) suggested that 12 students per class is the best number for fostering vigorous online discussion. Rovai (2007), elaborating on how to develop a sense of community in an online course, suggested the minimum number of students in a class should be eight and the maximum 30. Overall, my class size was close to or well within these suggested enrollment numbers.

Forum access. In my course, I left the discussion forum open from week-to-week, and from semester-to-semester. My purpose during Semester 1 was to allow participants time to reflect and, if necessary, review and revise their points of view by adding forum comments. Had the forum topic closed (say, for example, each week on Sunday night – a convention that I have been advised to practice when facilitating undergraduate courses) this would not have been possible. Although cut-off times for contributing to forum topics gives students an incentive to complete assigned readings and participate in discussion, limited access to comments could also be considered a restriction on a student's potential for learning. The practice of closing forum topics causes students to lose the opportunity to return to earlier topics and build upon ideas after a longer period of reflection.

In Semester 2, I carried on with my previous practice of leaving the forum open as we moved from topic to topic. By merging the discussion forums of the two semesters, I allowed participants to view and build upon comments made by members of the

previous cohort. Essentially, Semester 2 participants continued developing the collective wisdom of the community by having access to the assets of cognition, knowledge, and expertise, which existed as artifacts of prior learning. My intention was that threads begun in Semester 1 would continue into Semester 2. The ability to access this prior dialogue is essential to the ethos of WisCom, which is partly based on the theory of distributed cognition. Gunawardena et al. (2006), referencing distributed cognition as an element in the WisCom design, stated, "Distributed cognition asserts that cognition, knowledge, and expertise are not merely a property of individual minds but are distributed across individuals, environments, external symbolic representations, tools, and artifacts" (p. 218). Although I encouraged participants from Semester 1 to return to the course forum during Semester 2, there was no evidence that they had used their access to visit after the completion of their six-week course. This was disappointing but not surprising. I was further dismayed to see that only one participant from Semester 2 responded to comments made in Semester 1.

Overall, the participants in both semesters of my course did not participate as hoped. In hindsight, I believe that they would have engaged with a greater demonstration of constructivist zeal had I included more of what Dron (2007) referred to as *constraints*. Specifically, had I included time constraints regarding when comments could be posted in the forum, procrastination and inertia might have been prevented. However, returning to the observations of Schwier and Seaton (2013), the non-formal nature of my course might have nonetheless caused participants to limit their involvement in the course and simply lurk.

Mentors. In a community of practice, built to sustain a committed group with a common interest, the practice of recruiting mentors to introduce and acclimatize newcomers seems to be reasonable and workable. However, when the group forms with a transitory enrollment of students, the practicality of mentorship wanes. As demonstrated in my course, none committed to the task of essentially co-facilitating the online community. In the absence of a strong external motive, such as a higher grade, a job reference, or experience for future employment as a teacher, my older adult participants apparently perceived the role of mentor as onerous.

Throughout the inaugural use of WisCom (Gunawardena et al., 2006), graduate students from a previous semester of the course were among those who accepted the role. Other mentors in the inaugural course were instructors and graduate assistants, all of whom had volunteered their time. As I was unable to enroll anyone to perform this task in my course, I began to question the practicality of mentorship. Mentorship offers little recompense besides the goodwill of those who have contracted the mentors as volunteers. Furthermore, mentoring in a classroom is essentially fulfilling the role of a tutorial assistant, which is a paid position in universities. It is a position comparable to that of the teacher, requiring considerable commitment, knowledge, managerial and organizational skill. In fact, a review of literature concerning the apprenticeship model finds teachers referred to as mentors, as well as practitioners, masters, and advisors (Carlson, May, Loertscher, & Cobia, 2003, p. 31). The responsibilities ingrained in this role are extensive:

> The mentor's role is to support, challenge, and provide vision to the learner. The mentor establishes a basic sense of trust, actively listens, provides structure to the

> learning environment, expresses positive expectations, advocates for the learner, and shares experiences with the learner. To challenge the learner, the mentor introduces ideas contradictory to the learner's concepts, questions the learner's assumptions, and forces the learner into self-discovery processes by withholding answers to some questions. The mentor creates a tension within the learner that causes a drive for closure. As vision providers, mentors encourage learners to explore new possibilities, directions, purposes, and meanings to help them see where they have been and where they are going. (Carlson, May, Loertscher, & Cobia, 2003, p. 33)

Drawing upon the notion of apprenticeship in a community of practice, Gunawardena et al. (2006) describe mentors as serving "a critical role in legitimizing the knowledge commodity created during the learning event" (p. 226). Although WisCom indicates that mentors can be culled from students in previous cohorts of a class, the older adult participants in my course were uninterested in volunteering for this job. Those five participants I approached individually to fulfill this role politely declined. Jennifer, for example, wrote, "Thank you for asking me to work with you on this, Lynn. My retirement is busier than I can describe. It's too much for me to take on more volunteering." Similarly, Jack wrote, "After this course is over, I'm off to study French at the community centre. That's enough for me, have to say no thanks." Having had no success in the one-on-one approach, I threw open the mentoring invitation to the entire class. There continued to be no interest. It became apparent that the participants in my course were not comfortable with the prospect of volunteering as mentors, especially

when the responsibility would require them to remain in a course they had completed rather than moving on to a new interest.

This experience has caused me to question what I characterize as idealistic thinking behind the community of practice model, which Gunawardena et al. (2006, 2019) used as one of the theoretical foundations upon which the WisCom framework rests. My suspicions heightened regarding the soundness of the model when my literature search revealed critiques by Eraut (2002) and Li et al. (2009). At the core of both papers was the issue that the community of practice model is an ideal that has little reference to reality.

A community of practice is formed when people with a common interest collaborate, negotiate meanings, exchange and form new ideas (Wenger, 1998). On paper, this sounds like an excellent approach to knowledge building. In reality, problems of intention and power can interfere. In their systematic review of communities of practice, Li et al. (2009) noted a difference between those explicitly formed to apprentice newcomers in a skill and those not formed with this intent. Li et al. (2009) observed that mentors were not present and seemed not to be required in communities of practice that did not involve acquiring a vocational skill. Another critique concerned the issue of power. In those communities of practice where mentors prepare apprentices for their vocations, the power relationships are clear. In communities of practice where a vocational apprenticeship is not the objective, imbalances of power become problematic. Li et al. stated that

> The inherent assumption was that members of a CoP are naturally collegial, honest, and respectful of each other, and that they put aside their personal

> agendas for the common good. However, in the non-apprenticeship CoPs, members may not necessarily develop beyond a position of peripheral participation. (2009, p. 6)

Eraut (2002) identified a similar problem, albeit from conceptual and semantic perspectives. In deconstructing the notion of community, he stated that the sharing of information depends upon mutual respect and trust. He expressed doubt that this trust could develop without significant prior social engagement by those in the community. Even then, he referred to the many ordinary problems that could prevent a community of practice from forming, such as "individual factors relating to power, status, confidence and dispositions" (p. 5). Altogether, this leads me to question how realistic it was for Gunawardena et al. (2006) to project that students in an online course built with the WisCom instructional design model would commit to building "a wise community that shares a common mission; engages in reflection and dialogue; develops mutual trust, respect, and commitment; cares for the common good; empowers its members; and solves problems pertinent to society" (2019, p. 34). I further challenge the need to form a community of practice with a group of students who will not regard their online relationships as long-term. Although students using the WisCom model may indeed form a wisdom community, any commitment is likely to be transitory. This may be especially true of retired adult learners, who would not be preparing for vocations.

Overall, the most helpful critique of the community of practice model was by Li et al., who charged that "It is actually not a theory of social learning; rather, it is a broad conceptualization of how learning occurs in a social environment and forms the basis for middle-range theories that are more concrete and address specific problems" (2009, p. 6).

Adding to this, Li et al. remarked that the model's original focus has changed throughout its adoption by various organizations over the years. I believe that the original rationale for including mentors in a community of practice – to inculcate newcomers in a trade or skill set – has been muddied as the result of these accrued divergences. In fact, Wenger, McDermott, and Snyder, in redefining the community of practice model in 2002, referred to it as "groups of people who share a concern, a set of problems, or a passion about a topic, and who deepen their knowledge and expertise in this area by interacting on an ongoing basis" (p. 1). By comparison, students in semester-long courses, particularly when the learning is non-formal, may possess only a casual interest in the subject under study. Hence, I believe that the requirement of including mentors in the WisCom instructional design model is an unnecessary and impractical aspect of the design.

The Cycle of Inquiry and the Spiral of Inquiry

Gunawardena et al. (2006), describing the WisCom model, suggested that students could have a transformative learning experience with each course in a program of study, provided it were to follow the *spiral of inquiry* curriculum design (Gunawardena et al., 2006, p. 227). Although this notion went unmentioned in the 2019 update of the WisCom model, I include the original diagram depicting this movement through a program of studies (Figure 5.1.). This design, first proposed by Bruner in 1960, posits that student understanding will deepen through "an iterative revisiting of topics, subjects or themes" (Harden & Stamper, 1999, p. 141). Key concepts are reinforced and the students' appreciation of a topic increases.

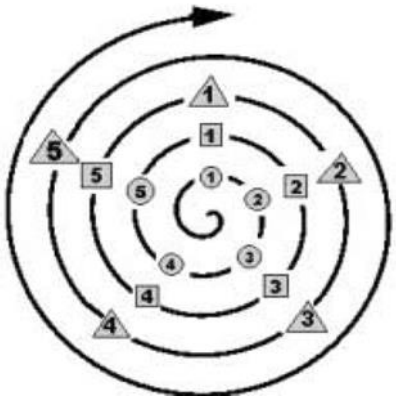

Figure 5.1. WisCom spiral of inquiry program design.

Note. From "New model, New strategies: Instructional design for building online wisdom communities," by G.L. Gunawardena et al., 2006, *Distance Education, 27*(2), p. 227.

The idea that students might experience transformative learning within an entire program of study is not an unreasonable proposition. Students might also experience changes to meaning schemes (Mezirow, 1995) as the result of repeated assumption-challenging themes found throughout a program of study, or even within the context of one course. Insights gained through changes in meaning schemes would likely have a significant impact on students' attitudes, ways of relating to the world, and how they would understand experience. More difficult to accept is that the ten-step experience of disorienting dilemma through to perspective transformation, as described by Mezirow (1978a, 1978, 1991) might occur within a single course of study, which is the premise of the cycle of inquiry module design discussed in WisCom (Gunawardena et al., 2006). Within my course, I saw no evidence that any of my participants had experienced perspective transformation. However, some did appear to experience changes to meaning schemes, as evidenced by their comments during our interviews. Based on this

observation, it is possible that the cycle of inquiry in WisCom is overburdened by the expectation that it will expedite dynamic changes in a student's behaviour, understanding of self, and acceptance of belief systems. Although it is possible that students taking a course that uses the cycle of inquiry would experience perspective transformation, I suggest that there are other laudable outcomes in education besides a transformative learning event**.**

Finding and Defining the Wisdom Community

Dron (2007) suggested that an online community could be considered an entity, separate and distinct from those individuals who have joined. Gunawardena et al. (2006), following Wenger, asserted that learning communities carry out a transformative practice, and that a community will change as participants engage and develop new understandings (p. 215). Gunawardena et al. (2006) further proposed that the WisCom model provides a framework for a wisdom community where perspective transformations could occur "on both the individual and community levels" (p. 219). Whether a perspective transformation within the learning community occurred with the inaugural WisCom research project in 2006 was not reported by the investigators. How a community-wide change could be identified was also left open for speculation. Individual transformations, however, were anticipated and reported. "When learners are led to reflect on and question something previously taken for granted and thereby change their views or perspectives, transformative learning has taken place. This is the definition of transformational learning we have adopted for WisCom" (Gunawardena et al., 2006, p. 222).

But what exactly is a wisdom community? Gunawardena et al. (2006) provided a definition that fails to differentiate it from other convivial groups. Rather than suggesting how one can locate the community, Gunawardena et al. (2006) described it as an entity separate from its members within. Rather than providing clues on how a wisdom community appears to those on the outside, Gunawardena et al. (2006) listed its virtues. Readers are told that a wisdom community "shares a common mission, engages in reflection and dialogue, believes in mutual trust, respect, and commitment, cares for the common good, and empowers its members" (p. 219). Rather than stating how members of a wisdom community would perceive and describe the experience of belonging, Gunawardena et al. (2006) revealed what WisCom values. It "puts a premium on interaction, both among learners and between learners and instructors" (p. 220). Adding further confusion, Gunawardena et al. (2006) warned prospective WisCom users that "if a sense of community is not conceptualized internally, it will have more difficulty in reaching deeper levels of understanding" (p. 220). Reflecting on this assertion, I have struggled to ascertain how "internal" concepts and "deeper" levels of understanding can be isolated and identified. I have also struggled with the more general problem of discussing concepts such as wisdom and community. Moore (1989) recognized a similar issue when he stated,

> Many of the greatest problems of communicating about concepts, and, therefore, practice in distance education arise from our use of crude hypothetical constructs — terms like distance, independence, and interaction, which are used in very imprecise and general ways, each having acquired a multiplicity of meanings. (p 1)

Moore's lament parallels my predicament of being unable to locate the wisdom community in WisCom. I struggled to discern the boundaries of a construct that can be interpreted variously.

Definitions had not been overlooked entirely by the developers of WisCom but were too vague to be useful. In 2006, Gunawardena et al. stated that they had

> adopted the metaphor of giftedness from Keresan Pueblo communities in New Mexico as a core value of our wisdom community, where giftedness (or the Western concept of intelligence) is defined as the individual's ability to contribute or "give back" to the well being of the entire community (Romero, 1994). Like the Keresan Pueblo communities, we believe that talented people have special skills or abilities, while gifted people possess these same skills or abilities and are also able to teach or share these talents with others. The individual is seen in relationship to the community. (p. 219)

While the metaphor of giftedness is lovely, it is not a definition that allows one to easily identify the phenomenon of wisdom when it occurs. Rather, the description of wisdom by Gunawardena et al. (2006) is what Moore referred to as a "crude hypothetical construct" (1989, p. 1). Ordinarily, discussing ideas through the use of metaphor and imprecise terms is not problematic. However, in this situation, an observable behaviour was necessary for me to conduct research. As Gunawardena et al. did not provide a satisfactory description, I searched for a definition of a wisdom community that would be appropriate and in the spirit of the WisCom model.

Defining a wisdom community. For the concept of community, I looked to Dewey, who defined it as communication and meaningful association based on common

interest (1927). To me, this suggested that my participants would form a community if they responded to one another with thoughtful comments in the course forum.

To identify wisdom, I looked to the 11th-century Jewish mystic Solomon ibn Gabirol. Despite his ethereal occupation, he proposed five tangible stages in the acquisition of wisdom. These stages, which relate to actions, make the phenomenon observable. The first of these actions is silence, the second is listening, the third is remembering, the fourth is practicing, and the fifth is teaching others (Laumakis, 2014). Besides the palpability afforded by Gabriol's definition, I chose to adopt his notion of wisdom for two other reasons. The first was because the stages suggest development of wisdom as a quality acquired through reflection, cognitive exercise, praxis, and the generative activity of instructing others. As with Erikson's (1993) epigenetic scheme of psychosocial development, Gabirol's wisdom builds upon a series of successfully navigated learning experiences. For one to arrive at wisdom and be able to instruct others, there are "certain laws in the fundamental relations of the growing parts to each other" (Erikson & Erikson, 1982, p. 28). In other words, there is an identifiable progression of stages.

The second reason I chose to use Gabirol's stages of wisdom is that it is reminiscent of the steps in the cycle of inquiry (Gunawardena et al., 2006). This is illustrated in Table 5.1.

Table 5.1. *Comparison of Gunawardena et al.'s (2006) steps in the cycle of inquiry to Solomon ibn Gabirol's stages of wisdom* .

Steps	Steps in the cycle of inquiry (Gunawardena et al., 2006)	Stages	Solomon ibn Gabirol's stages of wisdom
1	Learning challenge	1	Silence
2	Initial exploration	2	Listening
3	Resources relevant to the challenge	3	Remembering
4	Reflection and reorganization	4	Practicing
5	Negotiation and preservation	5	Teaching

Gabirol's Stage 1, silence, finds a parallel in the cycle of inquiry's Step 1, the *learning challenge,* which does not assign any actions for students. Rather, in this step, students apprehend the "case study, problem, or issue" they will encounter within the course (Gunawardena et al., 2006, p. 224). In my course, I began by communicating objectives and instructions to the participants.

Gabirol's Stage 2, listening, finds a parallel in the cycle of inquiry step 2, *initial exploration,* where the shared identity of the students is built. At this stage, in order to help create a sense of mutuality, the students are urged to "exteriorize current meaning schemes and begin to generate initial ideas to address the challenge" (Gunawardena et al., 2006, p. 224). In my course, I prompted the participants to discuss their implicit theories, or personal beliefs about wisdom. After the conclusion of each semester, I sought evidence that they had not only expressed their own points

of view in the forum, but also that they had read – or, as Gabriol would say, listened – to the thoughts of others. What I found among my participants was that some were indeed expressing their own points of view, although this was not nearly as widespread a phenomenon as I would have hoped. Further, my participants did not appear to be listening and then responding to others but rather were simply adding their own comments to the forum. This was particularly surprising because so many of them mentioned the value of listening in their comments regarding wisdom. On a positive note, many participants were listening to me. My role as facilitator was apparently one that elicited their attention and response. By way of example, one participant named Deborah noted that she continued to carry ingrained notions from her youth about the respect due to teachers.

Gabirol's Stage 3, remembering, finds a parallel in the cycle of inquiry's step 3, *resources*. Here, students are expected to demonstrate that they are making connections from the course to their own lives. In my course, I looked for comments that indicated new ideas were being compared to assumptions my participants held. I also made available links to external resources that the participants could consult.

My participants provided no evidence that they had consulted any of the external resources I provided. Nevertheless, a considerable number of participants – particularly the men, who were less cautious about revealing personal information – provided autobiographical information to support their opinions and make connections from the course material to their own lives. I also found that one of my participants, Barbara, was considering finding her own resources and carrying on with self-directed learning on the topic of wisdom after the end of our course.

Gabirol's Stage 4, practicing, finds a parallel in the cycle of inquiry's *reflection and reorganization*. At this step, participants began working on case studies. I sought evidence of wisdom development in the forum through signs of reflection resulting in new points of view. In the interview responses from participants, there were indications that some had begun to reflect on the case study material after the course. For example, Jack, Lin, Deborah and Nyla referred to their lingering thoughts and questions after the course had ended.

Gabirol's Stage 5, teaching, finds a parallel in the cycle of inquiry's step 5 (Stages 5 and 6 in Gunawardena et al., 2019). This step involves negotiation and preservation. Archiving the "knowledge commodity" (Gunawardena et al., 2006, p. 226) preserved it for use by future students. In the forum, I searched for indications that participants had been inspired in some way by the course discussion and for evidence that they might use what they had learned outside of the course. Although I found no evidence of this through participant responses, Jack, Lin, Nyla, and Deborah seemed to be transitioning through stage 4 at the time of our interview. It is possible that they would arrive at Stage 5 at some later point in time.

A difference of note between Gabirol's version of wisdom acquisition and that of Gunawardena et al. (2006) is that Gabirol understood wisdom acquisition as a solitary event, led by one esteemed mentor, while Gunawardena et al. (2006) presented wisdom as something that could be developed through group collaboration. Another difference is that Gabirol appeared to understand the development of wisdom as linear. Conversely, Gunawardena et al. (2006, 2019) portrayed its development as cyclical, obtained throughout a carefully assembled cycle of inquiry.

From my observation, I would say that the participants followed these steps, and in that order, within the course. Some participants, having found their bearings, were beginning to discuss personal beliefs and allude to affective responses when they answered questions I had posed in the LMS forum. As evident from my interviews, others were still reflecting on the course after it had ended, which suggests that they continued to learn although the community had disbanded. Had the course been longer, it is possible that some participants may have become comfortable enough to begin engaging in more dialogue and working toward the formation of a wisdom community. How long this might have taken I can only speculate, given that most (if not all) participants appeared to be new to collaborative learning. As it evolved, I did not identify the wisdom community that Gunawardena et al. (2006) predicted would form when students interact within a course built using the WisCom model. I believe that this resulted because my participants perceived their relationship to be temporary. As stated by Conrad (2002) "There are significant differences between a one-time or short-term online existence and an on-going programmatic experience" (p. 105). My course, being transitory, did not encourage enough commitment from the participants to prompt the formation of a community.

The Older Adult Learner and WisCom

Age-related resistance to change may have limited the potential for transformative learning among my participants. It is possible that they resisted the opportunity to experience a perspective transformation because they were "emotionally attached to the beliefs, knowledge, values, and world views…developed over a period of many years" (Spigner-Littles & Anderson, 1999, p. 206). This resistance is postulated to

manifest in response to both ideas and practices that contravene previously held notions about what should and should not occur. Referring to resistance in the classroom, Delahaye and Ehrich (2008) discussed how older learners might oppose any departure from a traditional, teacher-centered approach to learning. “Older learners may initially anticipate and even desire traditional teaching methods with instructors lecturing and providing feedback (Delahaye & Ehrich, 2008, p. 652). Although some of my participants became comfortable with learning in the constructivist environment of WisCom, there were indications of dismay and surprise over the expectations of a collaborative environment. The low participation of those in my course could be understood, at least in part, as an expression of resistance to change.

Cognitive presence. According to Garrison and Arbaugh (2007), cognitive presence can be found when students “are able to construct and confirm meaning through sustained reflection and discourse” (p. 161). If it were found to be true that older adults are less inclined to work out meaning through discussion, it would be useful to know how cognitive presence is developed in a community of late-life learners. A review of the literature indicates that there are replicable approaches to investigating cognitive presence. Among the most recent studies, in 2018, Stewart presented research that measured knowledge construction by peers. Her approach, which was “triangulating interviews, observations, and an analysis of student writing” (p. 16), could certainly be applied to a class of older adult learners.

A problem that parallels low cognitive presence is that of low participation. During the post-course interviews, one participant interjected that she had stopped reading the comments of her classmates. It was unclear whether the other participants (a)

were largely ignoring the comments of others or, (b) were reading comments and often choosing not to reply. Examined through the four-dimensional framework established by Wise, Hausknecht, and Zhao (2014a) and Wise, Zhao, and Hausknecht (2014b), it appears that the listening behaviours of participants in my class lacked a combination of depth, breadth, revisitation, and temporal contiguity. Following this model, had participants been reading one another's posts thoroughly, the outcome would have been more frequent and more thoughtful comments.

Constructivism and cognitive dissonance. Interview responses after the course indicated that participants were accustomed to taking a more passive role in the learning transaction. Participation in a community of learners was unfamiliar, surprising, and disconcerting for many. This speaks to the challenges of developing a successful course based on constructivist principles when the students are older adults. Delahaye and Ehrich (2008) provided an explanation of this problem when they studied the learning preferences of 250 older adult learners. Drawing their conclusions from answers in a questionnaire, they found support for the contention by Truluck and Courtenay (1999) that older students favour traditionally structured learning where they can observe and reflect as the teacher provides direct instruction. Nevertheless, as Delahaye and Ehrich (2008) remarked, the literature provides a more textured profile of these learners, indicating that they enjoy both dependent and independent learning tasks, perhaps cycling back and forth as new learning is acquired and mastered (p. 660).

In a conceptual paper regarding constructivism and the older adult learner, Spigner-Littles and Anderson (1999) discussed the challenge of introducing new ideas or practices to this population.

> Older learners tend to be emotionally attached to the beliefs, knowledge, values, and world views that they have developed over a period of many years. Even when faced with irrefutable information that contradicts long held beliefs, these learners are much more likely to reject or attempt to explain away such new information. (p. 204)

Many of my participants expressed cognitive dissonance when they appreciated the collaborative, constructivist format of my course. They were reluctant or resistant to participation in online discussion because this expectation was so unfamiliar. This surprised me because I had anticipated that if participants were to experience internal conflict or mental discomfort, it would be as the result of the course discussions, not as the result of the instructional design. That stated, some did express their uneasiness with the lack of a clear and definitive answer to the dilemmas posed by the case studies. I interpret this as evidence that some participants were experiencing an assumption-challenging dilemma themselves as they tried to work their way through the possible resolutions in the case studies. Sternberg stated, “A conventionally intelligent person is someone who sees ambiguity as something to be resolved” whereas “the wise person is comfortable with ambiguity, and, indeed, sees it as inherent in virtually all interactions” (1990, p. 155). This implies that the lack of certainty inherent in proposing a solution to a dilemma, and the context-dependence of the solution’s success can cause feelings of distress to those who have not achieved

wisdom. As some of my participants appeared to experience a disorienting dilemma as either the result of the constructivist course design or as the result of the case study discussions is an indication that they were at Phase 3 in Mezirow's (1991) 10-phase process of transformative learning – "a critical assessment of epistemic, sociocultural, or psychic assumptions" (p. 168). This suggests that their perspective transformation was occurring in an incremental, epochal manner (Dirkx, Mezirow, & Cranton, 2006). If transformation were to occur at all, it would not be within the time-limited confines of the course, but rather as the cumulative result of ongoing reflection on the disorienting experience.

Critical reflection. In the WisCom model, collaborative inquiry using critical reflection is a central method of fostering a wisdom community. The goal is that learners should achieve perspective transformations and become "collectively wise" (Gunawardena et al., 2006, p. 219). To promote this outcome, learning activities are designed "to foster interactional competence, social negotiation of meaning, and construction of new knowledge" (p. 219). The wisdom community evolves through sharing and challenging ideas. For this reason, the WisCom model is an example of Thorpe's (2002) insight regarding the paradigm shift that much of distance education has experienced over the years, wherein interaction and independent study have become supports to group collaboration. Echoing and building upon Thorpe's observations, Gunawardena et al. commented, "Unlike early models of independent study that stressed individual learning, the goal of WisCom is to create a wise community" (2006, p. 219).

Describing antecedents of wisdom in old age, Ardelt (2000a) stated, "Reflective thinking decreases one's self-centeredness and enables one to see reality and oneself more clearly including the negative aspects of life and the complex and sometimes contradictory nature of human behavior" (p. 361). This remark is of interest to the wisdom community aspired to by the WisCom model, especially in its use with older adult participants. Gunawardena et al. (2006) noted that an online learning environment allows for reflective cognitive processing not ordinarily found in face-to-face interaction (p. 219). According to Ardelt (2000a) and Gunawardena et al. (2006), reflective thinking among older adults should promote personal insights, which in turn can trigger wisdom gains and perspective transformation. Although it was evident that some of my participants were changing their assumptions throughout the course, there was no evidence of wisdom acquisition or of a completed transformative learning event.

Semester 2 compared to Semester 1. In Semester 2, 12 participants were enrolled, two of whom identified as men. Unlike the cohort in Semester 1, longer comments and occasional question posing by participants in Semester 2 indicated that they were, perhaps unconsciously, fostering a community. Their questions were directed at other participants. Unfortunately, the practice of question posing was not widespread. Although the longer posts and the question posing could simply be indicative of more extroverted participants in Semester 2, the pre-existing archive of student knowledge that WisCom (Gunawardena et al., 2006) advocates is intended as a means of easing the transition and emboldening those who are new to the learning community. The effect of this archive on Semester 2 participants was not dramatic, yet

the increased number of discussion posts and the greater length of these comments suggests that incoming students would benefit from access to forum comments of students who have taken an online course previously.

A similarity between the two semesters was that in both there was one participant who arrived with what appeared to be an agenda of proselytization. For example, during Semester 1, Alex, an evangelical Christian, seemed dedicated to the mission of serving as a witness to Jesus as a saviour to humankind. All his comments reflected this undertaking. Not surprisingly, the other participants – some of whom had identified as agnostic – politely refrained from challenging these points of view. Alex's participation seemed to be intended as a contribution to the wisdom of the community; nevertheless, his comments failed to rouse responses from his classmates. Perhaps it was difficult for participants to reply because most of Alex's comments were written in the form of assertions that concluded with a line of scripture. Contesting his remarks could be construed as an attack on his faith. For example, he posted:

> Fundamentally, I do usually wonder about my degree of wisdom, and thinking back to any event, I try to persuade myself that what I may have said was right at the time, wise or not. I try to act along the lines of Jesus' advice in Luke 12:12: 'Do not worry about what you will say. The Holy Spirit will give you the correct words at the right time.'

Another example of a participant with an agenda can be found in Lucy, who was enrolled in Semester 2. She was largely inactive until discussion turned to a moral dilemma presented within a case study. The context of the dilemma was historical, and the victims in the narrative were women. Briefly, the story concerns a colony of

pacifists in Philadelphia who were raided by pirates in the late 17th century. Although the women were raped, their menfolk refused on principle to defend them against their attackers. Even though I identified this case study as an unsubstantiated folk legend used for illustrative purposes, the anecdote clearly struck a note with Lucy. She seemed determined from that point forward in the course to inculcate within the learning community an appreciation of women's inequality in society. As was the case with Alex, her comments and questions went unanswered. One of her immediate responses to this case study was "How were the rape victims treated afterwards by their neighbours and family? To my mind, this is the most crucial issue." Note that I had deliberately provided dilemmas as case studies because these are the types of problems provided to research subjects in the Berlin Wisdom Paradigm. In that experiment, the wisdom of the participants is judged by how they discuss dilemmas and how well they consider cultural, socio-economic, and historical context in their proposed resolutions. My field note, written regarding Lucy's point of view indicated the following:

> Lucy failed to consider the historical context of the dilemma posed by the case study. Instead, she judged characters in the story using contemporary standards of behaviour. She's posted three times on this topic. None of her classmates responded. It's probably wise not to respond and invite debate.

Referring to previous work by Clayton and Birren (1980) and Kunzmann and Baltes (2003), Le (2010) noted that openness to ideas has been identified as a hallmark of wisdom development. Le stated, "openness requires accommodation, cognitive flexibility, and change from the habitual, ingrained ways of thinking, beliefs, and ideas

which is often needed for the development of wisdom" (2010, p. 173). The apparent inflexibility in Alex and Lucy's points of view are construed as a lack of openness.

Wisdom, Perspective Transformation, and the WisCom Model

In their 2019 update of WisCom, Gunawardena et al. provided the following definition of the wisdom community:

> We see wisdom as a synthesis of perspective, insight, flexibility, and humility with a concern for the common good reflecting a joint effort at developing one's own potential and that of others. We stipulate that wisdom can become a core value of individuals and groups; thus, the wisdom community. (Gunawardena et al., 2019, p. 57)

The wisdom community is described as a utopian environment that could be replicated within an online course of study built with the WisCom instructional design model. In my course, this optimum community of learners did not evolve. Gunawardena et al. (2006, 2019) also proposed that discussion-based learning situated within a course built on the cycle of inquiry model would foster transformative learning. In my research, I did not find that perspective transformation occurred within my group of participants. Further, I noted that transformative learning had been misidentified in the original WisCom model experiment in 2006. As a critique of the original WisCom experiment conducted by Gunawardena et al. in 2006, I suggest that those students showed more evidence of changes to meaning schemes than of having experienced transformative learning. I found the same result among my participants, some of whom appeared to have had changes to their meaning schemes. Reflecting on this conclusion, I allowed the possibility that I had been too strict in my interpretation of

perspective transformation when I examined my data. Ultimately, evidence from the literature has caused me to believe that my assessment was true to Mezirow's (1978a, 1991) description of the phenomenon.

Another aspect of my findings regarding the transformative learning of participants relates to Mezirow's claim (1978a, 1978, 1991) that disorienting dilemmas spark the process. Despite a dearth of empirical evidence or analysis, conceptual literature suggests that older adults are not as receptive to transformative learning as are those who are younger. Dwyer (2017) speculated that older adults are averse to critical thinking. Kokkos (2013) suggested that older adults form their meaning perspectives through stereotypes and myths. These conjectures portray the older learner as unanimously close-minded and resistant to change. Among the participants in my study, another explanation became evident. Older adult learners, who have experienced both personal and circumstantial changes throughout life, are not necessarily averse to change. Rather, they are unlikely to be as strongly affected by new ideas and events that might cause a younger person to experience a disorienting dilemma. Although some of my participants were vocal about their perceived inability to change their way of thinking, others appeared to be processing the new information encountered in my course cautiously, but with open minds.

The WisCom instructional design model is a good framework for online course development, particularly when the subject matter is derived from the social sciences or liberal arts. It lends itself well to case study, problem-based learning, and online learning where discussion is encouraged. However, my two course cycles with older adults did not demonstrate that the model provokes perspective transformation or

wisdom development. WisCom struck me as being a useful design for inspiring critical reflection leading to changes in meaning schemes. Nevertheless, as with a perspective transformation, students who experience these changes must first be in a frame of mind that opens them to new ideas. The death of a spouse, the birth of a first grandchild, a serious illness, moving, or retirement from a long career are examples of the types of disorienting dilemmas that might make an older adult receptive to reflection on assumptions. The subject matter of a course alone may be insufficient to challenge the beliefs of members in this demographic group, whose meaning schemes and habits of mind have been solidified over many years. As suggested by Spigner-Littles and Anderson (1999), the habits of mind of older adults may be more intransigent than those of younger students.

Participants in my course did not complete a transformative learning experience. Nor did they form a wisdom community. However, during the case studies, some of them did begin to engage in dialogue that appeared to spark a burgeoning critical reflection. It is the completion of this process that Gunawardena et al. (2006, 2019) stipulated as a means of developing both transformative learning and wisdom. In the most recent publication related to the WisCom model, Gunawardena et al. (2019) explained the relationship as follows:

> Transformative learning occurs when educators empower learners to engage in critical reflection and collaboration. Through critical reflection, learners challenge beliefs; through collaboration, they hear diverse perspectives and receive feedback on their thinking, writing, and speaking. Eventually, critical reflection and collaboration result in changes in perspective. These changes—

> not merely new thoughts, but new ways of thinking—lead to a range of long-term outcomes, including new knowledge, skills, attitudes, and, ultimately, deeper wisdom. (2019, p. 148)

Although my participants engaged in little critical reflection and collaboration, I would endorse the WisCom model as a good design for online learning as there were some aspects that worked adequately for my non-formal course and might be outstanding in formal education. For example, in Semester 2, some of my participants benefitted from the archived forum comments from Semester 1. This suggests that the preservation of knowledge is an element of the design that would be useful for learners who arrive after the inaugural run of a course. Further, the cyclical design of the WisCom model and the use of problem-based learning through case study produced some limited collaboration among my participants. Unfortunately, the novelty of this approach to learning was problematic for my participants, who were accustomed to a teacher-centered approach to education. I believe that WisCom would be most successful among students who have had previous experience in a constructivist-learning environment.

Summary

In this chapter, I have discussed themes that emerged from my analysis of data. These were The WisCom Model and Non-formal Learning, The Cycle of Inquiry and the Spiral of Inquiry, Finding and Defining the Wisdom Community, The Older Adult Learner and WisCom, and Wisdom, Perspective Transformation, and the WisCom Model. In the final chapter, I summarize and draw conclusions from my research, followed by recommendations and personal reflections.

Chapter 6. Conclusions, Recommendations, and Reflections

Qualitative research is messy (Parkhe, 1993). Results are presented as if collected in an orderly fashion although the process is a "non-linear and often unpredictable undertaking" (Sinkovics & Alfoldi, 2012, p. 817). Countless hours are spent reflecting, backtracking, reassessing, and returning to the literature for passages that could help to explain findings. Stake (2010), referring to the challenges of interpretation and analysis in qualitative research, stated that the "changes in focus, 'zooming in' on the target or shifting to another, remain a subjective choice, open to challenge or reinforcement by others. The interaction of researchers with their research sites remains something distinctive in each qualitative study" (p. 132).

The conclusions and recommendations that follow reflect the challenges of making observations and collecting opinions that capture the essence of the research topic: older adults in an online learning community and their experience of using an instructional design model that purports to develop wisdom and perspective transformation. My conclusions regarding older learners' engagement in a non-formal online course on wisdom fall under these headings: Late-Life Learning with WisCom, Older Adults Learning Online, and Wisdom in This Use of Wiscom.

Late-life Learning with WisCom

Gunawardena et al. (2006) asserted, "The WisCom model calls for the recognition of the wise ones in the community who would serve as mentors" (p. 220). Aside from the problem that Gunawardena et al. (2006, 2019) provide no tools with which to identify a "wise one" in the community, I was unsuccessful in encouraging any of my participants to serve as volunteer mentors in my course. As a result, I have concluded that mentorship needs to be reconsidered as an integral element in the

WisCom design. It should only be included when the course is formal, and only if the students are learning a vocation or considering careers in instruction themselves. Neither of these conditions applied in my course for older-adult learners. As I discovered, finding someone besides the instructor to fill the role of mentor with this demographic can be difficult, if not impossible. In lieu of mentorship, instructors using the WisCom model, especially among older adult learners, could consider assigning peer learners in every class. By creating pairs or small groups at the outset of a course, the sharing of information and broadening of understanding within the learning community could be maintained.

Throughout my course, the lack of participation surprised me. The opportunity to take part in an online learning community did not seem to be an incentive for those who joined. I find this especially puzzling because one of the main reasons for offering online courses through this U3A was to provide social contact to isolated older adults (Swindell, 2002). Rather than seeking interaction, my participants arrived with the expectation that they could engage with the course passively. Examining this problem through the community of inquiry framework, it is evident that my participants were neither prepared to collaborate nor to make new meanings from their learnings. Hence, they were unable to demonstrate cognitive presence. Garrison, Anderson, and Archer (2000) described cognitive presence as being "partly dependent upon how communication is restricted or encouraged by [its] medium" (p. 93). In the U3A where I facilitated my course, the LMS was restricted to text-based lessons. Although it is possible that video conferencing would have improved the discourse and collaboration of my participants, it is more likely

that their inclination to simply observe the facilitator was the main factor in the lack of lively discussion.

The apparent reluctance by my older adult learners to embrace a collaborative learning environment speaks to the possibility of an overarching limitation when teaching this demographic. Their lack of commitment to online discourse could also be interpreted as a limitation of the WisCom instructional design model when used in non-formal online courses. Extrapolating further, it also speaks to the limited potential for constructivist learning among students participating in Massive Open Online Courses (MOOCs). As noted by Clow (2013), MOOC participants follow the funnel of participation wherein "unequal patterns of participation" and steep attrition result as the course progresses (p. 5). Similarly, Schwier and Seaton (2013) examined participation in a non-formal online learning environment. Compared to informal and formal learning environments, they found that non-formal courses elicited the lowest rates of participation. To overcome the dearth of student comments in the discussion forums of non-formal courses, they recommended mandatory contributions.

Older Adults Learning Online

With the exception of a few energetic participants, those enrolled in my course were far less active in online discussion than I had hoped and anticipated. Why this was the case is not entirely clear. Based on remarks from surveys and interviews, I have derived that trepidation and lack of familiarity with collaborative learning online was largely the cause of this poor performance. As a result, I suggest that the U3A where I did my research would benefit from providing pre-course instruction to facilitators on methods of developing a learning community. It is apparent that many older adult

students need encouragement to participate in discussion forums. They should be coached on how to read and respond to the comments of other students. They should be encouraged to help build threads of ideas, which can create a sense of community while generating new knowledge. Likewise, facilitators should be given tips on techniques that would improve social presence (Garrison, Anderson, & Archer, 2003) in their online courses. Addressing this topic, Dunlap and Lowenthal (2009) recommended the use of Twitter. To some extent, they argued, Twitter can replicate the face-to-face experience of being in a course.

> What tends to be missing in online courses is the just-in-time, and sometimes playful, interactions that happen before and after class, during a break, and when students and faculty bump into each other between class meetings. Out-of-the-classroom interactions like these have potential instructional value (Kuh, 1995). They can help strengthen interpersonal relationships between and among students and faculty, which in turn can enhance the learning community inside the classroom. (Dunlap & Lowenthal, 2009, p. 129)

Dunlap and Lowethal (2009) also suggested inviting experts such as textbook authors to contribute their ideas via Twitter in an ongoing basis. As a result, the feed could become a community of practice where students are able to learn from not only their classmates and instructor, but also from authorities working in the field under study. To some extent – albeit limited by Twitter's requisite brevity – this practice could provide the knowledge archive advocated by Gunawardena et al. (2006, 2019) in the cycle of inquiry's final step, which involves preservation of the fruits of student

collaboration. Another affordance of Twitter as a learning tool is that it could improve the social presence (Garrison, Anderson, & Archer, 2003) in the course.

Wisdom in This Use of WisCom

Forum comments by my participants demonstrated that they thought careful listening was the strongest indicator of a wise personality. The second most frequently mentioned element was experience. Reflection, particularly reflection upon experience, followed these as a frequently mentioned method of attaining wisdom. Altogether, these results suggest that attending to others carefully, reflecting, and comparing new information to the wealth of one's own life experiences is how elders learn and how they believe wisdom is developed. The introspection suggested by these actions creates a conundrum for those hoping to involve older adults in collaborative learning where the anticipated outcome is wisdom. A further complication, which I observed from remarks made by my participants, was that listening and compassion were proffered both as qualities that contribute to wisdom development and as the products of a wise character. The notion of these attributes as both a cause and effect of being wise obfuscates the purported utility of WisCom as an instructional design model that foments wisdom in students. At the conclusion of a course where good listening skills and compassion are reported outcomes, a chicken-or-egg question lingers. A facilitator might reasonably ask which came first – the fine qualities or the wisdom.

Future Research

Future studies could include interviews with older adults to discover the prevalence of transformative learning experiences within this age group. Research questions could include (a) which types of experiences sparked the change, (b) the

uppermost ages at which the transformation occurred, if at all, and (c) how closely these transformative learning experiences compare to contemporary descriptions of wisdom development. I believe that the parameters for gauging perspective transformation need to be thoroughly delineated prior to embarking on such research. This would help to ensure that not every incident of learning is mislabeled as transformative. As regards perspective transformation occurring within the venue of a course developed using WisCom, it would be interesting to measure the effect of participating in a discussion forum. As noted by B. Heller (personal communication, 2019, September 23), "Generating posts requires thinking and maybe there are no short cuts per se but if one spends a sufficient amount of time thinking and behaving around a disorienting event, changes happen."

The relationship between previous educational attainment and wisdom in older adults is an area of research that might be fruitfully pursued in the future. In tandem, barriers to wisdom development, if any, as the result of a reductionist technical-rational education could also be investigated. Examining the role of education in wisdom development would complement earlier conceptual work by Sternberg, who stated,

> Although knowledge is necessary for wisdom, it is not sufficient for it. Merely having knowledge does not entail its use in judging rightly, soundly, or justly. Many highly knowledgeable individuals lead lives that are unhappy. Some of them make decisions that are poor or even reprehensible. This century provides many examples of such decisions.
>
> (2004, p. 167)

Participation habits of older adult learners online. A problem that I had not anticipated and did not fully appreciate until late in my research was the low participation of my older adult learners. Although low participation might be anticipated in any non-formal course, some of my participants admitted to confusion and discomfort at the prospect of sharing their thoughts and building on the ideas of their peers. In the future, it would be helpful to use analytic software for studying the participation habits of older adults in discussion-based online courses. It would be especially intriguing to learn how this demographic goes about reading, or "listening" (Wise, Hausknecht, & Zhao, 2014a; Wise, Zhao, & Hausknecht, 2014b) to other student comments. In tandem, or perhaps in a separate study, I would recommend open-ended interviews with older adult learners before, during, and after a discussion-based online course. Driving such an investigation would be an explanation of the navigation choices made by these students as they progress through an online course.

A related question, particular to the WisCom model, is the usefulness of an archive of comments from students who have taken a course of study previously. In my study, few participants built upon these comments in Semester 2. Future research could explore this question through analytics to identify how often students read these comments. Analysis of forum comments could further reveal the frequency and quality of comments that connect to those made by previous classes of students.

Berlin Wisdom Paradigm. Another direction that could be explored is the use of the Berlin Wisdom Paradigm within the vehicle of WisCom. Although I modeled my course discussion forum, in part, upon the dialogue and discussion requirements found in the Berlin Wisdom Paradigm, there were differences. These were (a) my course was

online; (b) in addition to case studies, my course included forum discussion topics that did not require problem-solving; (c) I was not using the five criteria of the Berlin Wisdom to assess the contributions of my participants; and (d) my course encouraged but did not mandate participation. These differences present possibilities for future research. The use of a face-to-face setting would no doubt have created a different dynamic in my course and hence a different degree of *social presence* (Garrison, Anderson, & Archer, 1999). As regards the discussion topics I chose to present, it is certainly possible that the wisdom development among the participants would have improved had I more closely adhered to the Berlin Wisdom Paradigm. For example, I could have limited forum topics to case study discussion. In retrospect, this would likely have elicited not only more results but also more useful results. Had I then used the five criteria of the Berlin Wisdom Paradigm to evaluate the wisdom of forum comments, I might have been able to assess whether participants were exhibiting or developing wisdom or "expert knowledge about the meaning and conduct of life" (Kunzmann & Baltes 2005, p. 117).

The final difference between my course and the Berlin Wisdom Paradigm is that participation was strongly encouraged but not mandatory for my participants. Compulsory participation and the resulting increase in the quantity of forum postings could have enhanced both the development of wisdom among participants and the quality of data collected. However, I am convinced that a non-formal learning environment such as a U3A would be the wrong venue for mandating participation; rather, a formal course of study would be an ideal place for the principles of the Berlin Wisdom Paradigm to be incorporated with the WisCom instructional design model.

Reflections

I usually teach face to face. Prior to this study, my online teaching had been confined to pre-packaged online courses delivered through an Ontario university's Faculty of Education, and to an internship through an online Master of Education course. Further, I had never previously taught a course on wisdom. I engaged in the developing, writing, and organizing of this online course because I wanted to learn and apply these skills. Preparing the course could be considered experiential education (Dewey, 1938), as I learned through doing. Although facilitating the course was a more familiar experience, it was complicated by my role as participant-observer. As noted by Vinten (1987), "the mere presence of the observer may affect the actions of the observed" (p. 25). Additionally, my responsibilities as participant-facilitator may have adversely affected the rigour with which I was able to observe. Upon reflection, I appreciate not only the intimacy granted by the participant-observer approach to data collection, but also the possible perils and limitations.

When considering areas in which my study was less than satisfactory, I return to the problem of low forum participation. It is possible that my participants did not experience perspective transformation because they had not embraced the cycle of inquiry. Although Gunawardena et al. (2019) describe the WisCom model as being flexible, they caution that a miscalculated cycle of inquiry experience "can become confusing and unwieldy, discouraging learners from engaging and undermining their experience" (p. 130). My inability to enlist mentors may have caused my participants to miss their chance at achieving perspective transformation and wisdom development. It is

possible – although, in my opinion, unlikely – that this differentiation from the original WisCom model was responsible for the lack of transformative learning.

Throughout this study, my interaction with the research site was complicated by the text-based virtual-classroom setting, which of course separated me from the social cues of my participants. In performing this virtual-ethnographic case study, I found myself by necessity imagining these signals so that the invisible speakers seemed more real to me. I not only imagined the timbre of voices in my participants, but I also found myself inventing bodies and nuances of character. My reflexive duty throughout this study was to recognize the interference of my imagination, which sought to compensate for the missing information about my participants. As evidence of how intrusive my imagined realities were, I was surprised by the sound of my participants' voices when we finally spoke on the phone. In some cases, the tone of voice altered my previous perception of their personalities. I include this information as evidence of the subjectivity in interpreting qualitative research. This also speaks to how text gathered from online communication is analyzed through a lens coloured by one's own experience. Markham, in noting that cyberspace is experienced variously, stated,

> Computer-mediated communication appears to be experienced along a continuum: For some, the Internet is simply a useful communication medium, a tool; for others, cyberspace is a place to go to be with others. For still others, online communication is integral to being and is inseparable from the performance of self, both online and offline. (1998, p. 20).

Therefore, the conclusions I have drawn from my research should be understood as my experience of being only one member – a participant-observer – in a diverse community.

I am persuaded that each of my participants experienced the community somewhat differently. In discussing the contrast between individual experience and collective knowledge, Stake (2010) remarked,

> Two realities exist simultaneously and separately within every human activity. One is the reality of personal experience, and one is the reality of group and societal relationship. The two realities connect, they overlap, they merge, but they are recognizably different. What happens collectively (for a group) is seldom the aggregation of personal experience. (p. 18)

Complicating my work has been a search for not only the individual, but also the collective experience of wisdom development among my participants. To borrow an analogy from Ardelt in 2005, discussing perspectives on wisdom is like the Buddha's story of the blind men and the elephant. Each blind man, feeling a different part of the gigantic creature, described a different piece of the whole, believing it to be the full reality. Similarly, I have tried to assemble my understanding from fragments.

Among these fragments were the various outcomes reported by my participants. In retrospect, I believe that I should have looked for evidence of a variety of positive outcomes beyond wisdom and transformative learning. In retrospect, I appreciate that not only sensational gains, but in fact, any learning that adds quality to the older adult's life could have been considered significant. Extolling the benefits of lifelong learning among older adults, Houle stated that it can prevent

> disengagement, particularly physiologically; even people severely disabled by the afflictions of old age can learn to re-establish some of their physical abilities. It can help in re-engagement, giving people the ability to take part in new interests

> and activities. And it can itself be one of those activities, helping to occupy the time which the old person often has in abundance…to live their lives with dignity, self-control and comfort; to spend their time with satisfaction and enjoyment; to make some contribution to society; to remain as far as possible a part of normal community life, including interacting with younger persons; and, most important of all, to maintain vitality of body and mind. (1974, p. 442)

Indeed, these practical benefits are likely what older adult students expect to obtain when they enroll in a course. When one learns skills that, for example, reduce the limitations imposed by a disability and allow one a sense of greater self-control and comfort, the change in quality of life could be substantial. In fact, the change could be transformative. Further, when a retiree learns how to make a new contribution to society, the actions that follow could result in wisdom gains.

Changes in perspective. I entered this research with the expectation that I would gain insight into the potential of online learning to foment wisdom development and perspective transformation. At the conclusion of this study, I hold an appreciation for the multifaceted process of cognitive and affective transformation among older adult learners. This type of substantial personal change appears to occur gradually, following paths formed by one's previous experiences. As a member of the demographic group I studied, I am acutely aware of how cautiously an older adult learner will move toward new ideas and new ways of thinking. The careful and incremental changes were difficult to assess in my participants. I have also come to apprehend the challenge of acknowledging my own perspective transformations and wisdom gains. These changes, I

now believe, can only be recognized in retrospect, through considerable introspection, and not until the process is evident through praxis.

At the conclusion of my research, I must acknowledge that I overlooked the possibility that wisdom development might be a private affair characterized by reflection and listening, which would make direct instruction an ideal method of learning. Rather than inspiring perspective transformation through discussion, I found that the requirement of discussion itself caused cognitive dissonance among some of my participants. Overall, the most disorienting dilemma my participants appeared to face was the necessity of engaging in unexpected discourse with strangers in the virtual classroom.

When I began this research, I had not considered the positive effect of an accretion of modest learning achievements. Rather, I was focused on the purported outcomes of WisCom; I was limited to thinking about dramatic, large-scale learning achievements, such as becoming wise and having a perspective transformation based on revelatory learning. As the result of coming to understand the potential importance of all learning for older adults, I have experienced a change in my own meaning schemes. I end this research divested of the notion that wisdom and perspective transformation are suitable objectives for a course of study. Rather, I now understand them as belonging to an array of desirable consequences of adult education.

Nonetheless, I believe that there is still room for rarefied outcomes such as wisdom development and transformative learning through education. An instructional design model such as WisCom should be championed for its efforts to keep students working toward sagacity as they accrue new knowledge, skills, and abilities. As stated by

Whitehead, “What I am anxious to impress on you is that though knowledge is one chief aim of intellectual education, there is another ingredient, vaguer but greater, and more dominating in its importance. The ancients called it ‘wisdom’” (1959, p. 30).

Summary

This case study used virtual ethnography to investigate a previously unexplored approach to research concerning older adult learners in a learning environment. The site of the study was an online, non-formal course at U3A. As a participant-observer, I experienced first-hand how the WisCom instructional design model performed with this demographic. Concurrently, I derived information regarding the implicit theories of wisdom held by participants. Forum comments from the course LMS, survey responses, interview transcripts, emails, and my field notes provided the raw data.

Overall, I found merit in the WisCom instructional design model, which is focused on building knowledge through constructivist principles in online courses. Despite a lack of apparent wisdom gains or perspective transformation, I saw evidence of learning among those who participated in my course. I also saw evidence of a respect for listening, which participants identified as the most significant quality of the wise.

References

Akintoye, A. (2017). Developing theoretical and conceptual frameworks. *The Journal of Environmental Design & Management Uploads, 3*(07). Retrieved from http://jedm.oauife.edu.ng/wp-content/uploads/2017/03/Akintola-Akintoye_Developing-Theoretical-and-Conceptual-Frameworks.pdf

Altheide, D. L., & Johnson, J. M. (1994). Criteria for assessing interpretive validity in qualitative research. In N. K. Denzin, & Y. S. Lincoln, *Handbook of qualitative research* (pp. 485-499). Thousand Oaks, CA: Sage.

Anderson, C.E., & Spigner-Littles, D. (1999). Constructivism: a paradigm for older learners. *Educational Gerontology, 25*(3), 203-209.

Anderson, T., & Dron, J. (2011). Three generations of distance education pedagogy. *The International Review of Research in Open and Distributed Learning*, *12*(3), 80-97.

Anderson, T., & Garrison, D. R. (1998). Learning in a networked world: New roles and responsibilities. In C. Gibson (Ed.), *Distance learners in higher education* (pp. 97-112). Madison, WI.: Atwood Publishing.

Anderson, T., & Kanuka, H. (1999). *Using constructivism in technology-mediated learning: Constructing order out of the chaos in the literature*. Retrieved from https://auspace.athabascau.ca/bitstream/handle/2149/728/Using%20Constructivism%20?sequence=1

Arbaugh, J. B., & Benbunan-Finch, R. (2005). Contextual factors that influence ALN effectiveness. In S. R. Hiltz, & R. Goldman (Eds.), *Learning together online. Research on asynchronous learning networks* (pp. 123–144). Mahwah, NJ: Lawrence Erlbaum.

Archambault, P. (1967). Commynes' saigesse and the Renaissance idea of wisdom. *Bibliothèque D'Humanisme Et Renaissance, 29*(3), 613-632.

Ardelt, M. (2000a). Antecedents and effects of wisdom in old age: A longitudinal perspective on aging well. *Research on Aging, 22*(4), 360-394.

Ardelt, M. (2000b). Intellectual versus wisdom-related knowledge. *Educational Gerontology, 26*(8), 771-789.

Ardelt, M. (2004). Where can wisdom be found? *Human Development, 47*(5), 304-307.

Ardelt, M. (2005). Foreword. In R. J. Sternberg & J. Jordan (Eds.), *A handbook of wisdom: Psychological perspectives* (pp. xi-xvii). New York, NY: Cambridge.

Arriagada, P. (2018) A day in the life: How do older Canadians spend their time? *Statistics Canada*. Retrieved from https://www150.statcan.gc.ca/n1/pub/75-006-x/2018001/article/54947-eng.htm

Augustine. (1992). *The confessions of Augustine: An electronic edition.* Retrieved from http://www.stoa.org/hippo/.

Australian Bureau of Statistics. (2018, March 28). *Household use of information technology, Australia, 2016-17.* Retrieved from http://www.abs.gov.au/ausstats/abs@.nsf/mf/8146.0 http://www.abs.gov.au/AUSSTATS/abs@.nsf/DetailsPage/8146.02016-17?OpenDocument

Baer, S., (2004). *Re-creating selves: Older women in academic degree programs* (Doctoral dissertation). Retrieved from https://search-proquest-com.libproxy.wlu.ca/pqdtglobal/docview/305049232/8D9BC07610664111PQ/3?accountid=15090

Baltes, P. B., & Staudinger, U. M. (2000). Wisdom: A metaheuristic (pragmatic) to orchestrate mind and virtue toward excellence. *American Psychologist, 55*(1), 122-136.

Baltes, P. B., Staudinger, U. M., & Lindenberger, U. (1999). Lifespan psychology: Theory and application to intellectual functioning. *Annual review of psychology, 50*(1), 471-507.

Bandura, A. (1977). Self-efficacy: toward a unifying theory of behavioral change. *Psychological Review*, *84*(2), 191-215.

Bandura, A. (1989). Human agency in social cognitive theory. *American Psychologist*, *44*(9), 1175-1184.

Baral, S. (2014). *Learning as leisure among older adults: Triggers, motivations and constraints of OLLI members.* (Master's thesis). Retrieved from https://tigerprints.clemson.edu/all_theses/2178/

Barker, R. (1968). *Ecological psychology: Concepts and methods for studying the environment of human behaviour.* Stanford, CA: Stanford University Press.

Barnes, H., & Parry, J. (2004). Renegotiating identity and relationships: Men and womens' adjustments to retirement. *Ageing and Society, 24*(2), 213-233.

Bassett, C. (2005). Emergent wisdom: Living a life in widening circles. *ReVision, 27*(4), 6-11.

Bassett, C. (2006). *Wisdom in three acts: Using transformative learning to teach for wisdom.* Proceedings of the Sixth International Transformative Learning Conference, The Michigan Center for Career and Technical Education, East Lansing, MI, 29-34.

Bates, C. A. (1993). *Wisdom: A postmodern exploration.* Los Angeles, CA: University of California.

Beaulieu, P. (2007) The social and intellectual setting of Babylonian wisdom literature. In R. J. Clifford (Ed.), *Wisdom literature in Mesopotamia and Israel,* (pp. 3-20). Atlanta: GA: Society of Biblical Literature.

Beckett, F. (2009). The U3A story. *Third Age Trust*. Retrieved from http://www.u3a.org.uk/the-u3a-story.html.

Beckett, R. C., & Jones, M. (2011, October). Active Ageing: Using an ARCON framework to study U3A (University of the Third Age) in Australia. In *Working Conference on Virtual Enterprises* (pp. 189-196). Springer, Berlin, Heidelberg.

Belenky, M.F., Clinchy, B., Goldberger, N.R., & Tarule, J.M. (1986) *Women's ways of knowing; The development of self, voice, and mind.* New York, NY: Basic Books.

Biggs, S. (2001). Toward critical narrativity: Stories of aging in contemporary social policy. *Journal of Aging Studies, 15*(4), 303-316.

Birren, J. E., & Svensson, C. M. (2005). Wisdom in history. In R. J. Sternberg & J. Jordan (Eds.), *A handbook of wisdom: Psychological perspectives* (pp. 3-31). New York, NY: Cambridge.

Birren, J. E., & Woodruff, D. S. (1973). Human development over the life span through education. In *Life-span developmental psychology* (pp. 305-337). Cambridge, UK: Academic Press.

Bleyl, M. (2000). *The wise ones: A multi-cultural perspective.* (Doctoral dissertation). Retrieved from https://search-proquest-

com.libproxy.wlu.ca/pqdtglobal/docview/619702636/38C7DFE0CA94417APQ/1?accountid=15090

Bloom, P. (2016). *Against empathy: The case for rational compassion.* New York, NY: Harper Collins.

Bluck, S., & Glück, J. (2005). From the inside out: People's implicit theories of wisdom. In R. J. Sternberg & J. Jordan (Eds.), *A handbook of wisdom: Psychological perspectives* (pp. 84-109). New York, NY: Cambridge.

Bolen, J.S. (2001). *Goddesses in older women: Archetypes in women over 50.* New York, NY: HarperCollins.

Boshier, R. (1971). Motivational orientations of adult education participants: A factor analytic exploration of Houle's typology. *Adult Education Quarterly, 21*(2), 3-26.

Boshier, R. (1980). *Towards a learning society: New Zealand adult education in transition*. Vancouver, BC: Learningpress.

Boshier, R., & Riddell, G. (1978). Education Participation Scale factor structure for older adults. *Adult Education, 28*(3), 165-175.

Bosma, H., van Boxtel, M. P. J., Ponds, R. W. H. M., Houx, P. J., Burdorf, A., & Jolles, J. (2003). Mental work demands protect against cognitive impairment: MAAS Prospective Cohort Study. *Experimental Aging Research, 29,* 33– 45.

Boud, D., & D. Walker. (1998). Promoting reflection in professional courses: The challenge of context. *Studies in Higher Education, 23*(2), 191-206.

Boulton-Lewis, G. M., Buys, L., Lovie-Kitchin, J., Barnett, K., & David, L. N. (2007). Ageing, learning, and computer technology in Australia. *Educational Gerontology,*

33 (3) 253-270.

Bowen, M. L. (2012). Beyond repair: Literacy, technology, and a curriculum of aging. *College English, 74*(5): 437-457.

Boyd, R.D. (1989). Facilitating personal transformation in small groups. *Small Group Behaviour, (20)*4, 459-474.

Boyer, N. (2005). Online learners take the lead in self-direction. *Academic Exchange Quarterly, 9*(4), 244-250.

Braga, A. A. (2009). Nethnography: A naturalistic approach towards online interaction. In E. Kock (Ed.), *E-collaboration: Concepts, methodologies, tools, and applications* (pp. 1611-1628). Hershey, PA: Information Science Reference.

Bransford, J., Vye, N., Bateman, H., Brophy, S., & Roselli, B. (2004). Vanderbilt's AMIGO Project: Knowledge of how people learn enters cyberspace. In T. M. Duffy & J. R. Kirkley (Eds.), *Learner-centered theory and practice in distance education: Cases from higher education* (pp. 209–234). Mahwah, NJ: Lawrence Erlbaum Associates.

Bratcher, D. (2006). *The character of wisdom: An introduction to Old Testament wisdom literature.* Retrieved from http://www.cresourcei.org/ wisdom.html.

Brookfield, S. (2009). The concept of critical reflection: Promises and contradictions. *European Journal of Social Work, 12*(3), 293-304.

Brookfield, S. D. (1995). *Becoming a critically reflective teacher.* San Francisco, CA: Jossey-Bass.

Brookfield, S. D., & Preskill, S. (2005). *Discussion as a way of teaching* (2nd ed). San Francisco, CA: Jossey-Bass.

Brown, J. S. (1998). Internet technology in support of the concept of "communities-of-practice": The case of Xerox. *Accounting, Management and Information Technologies, 8*(4), 227-236.

Brownlow, C., & O'Dell, C. (2002). Ethical issues for qualitative research in online communities. *Disability and Society, 17*(6), 685–694.

Bruner, J.S. (1960) *The process of education.* Cambridge, MA: Harvard University Press.

Bury, R. (2005*). Cyberspaces of their own: Female fandoms online*. New York, NY: Lang.

Butler, R. N. (1969). Age-ism: Another form of bigotry. *The Gerontologist, (9),* 4: 243–246.

Byles, J., Tavener, M., Robinson, I., Parkinson, L., Smith, P. W., Stevenson, D., ... & Curryer, C. (2013). Transforming retirement: New definitions of life after work. *Journal of Women & Aging*, *25*(1), 24-44.

Bynum, L. L., & Seaman, M. A. (1993). Motivations of third-age students in Learning-in-Retirement institutes. *Continuing Higher Education Review, 57,* 12-22.

Camp, C. V. (1985). *Wisdom and the feminine in the Book of Proverbs.* Sheffield, UK: Almond Press.

Carlson, N., May, W., Loertscher, R., & Cobia, C. (2003). Apprenticeship: Applications in adult education. *Journal of Adult Education*, *32*(1), 29-43.

Chandler, M.J. & Holliday, S.G. (1990). Wisdom in a postapocolyptic age. In R.J. Sternberg & J. Jordan (Eds.), *A handbook of wisdom: Psychological perspectives.* (pp. 121-141). New York, NY: Cambridge.

Charmaz, K. (2000). Objectivist and constructivist methods. In N. K. Denzin & Y. S.

Lincoln (Eds.), *Handbook of qualitative research* (pp. 509-535). Thousand Oaks, CA: Sage.

Chodorow, N. (1999). *The power of feelings.* New Haven: Yale University Press.

Clark, C., Strudler, N., & Grove, K. (2015). Comparing asynchronous and synchronous video vs. text-based discussions in an online teacher education course. *Online Learning*, *19*(3), 48-69.

Clark, L. (2013). *Older adult community college students' perceptions of readiness for learning online* (Doctoral dissertation). Retrieved from https://search-proquest-com.libproy.wlu.ca/pqdtglobal/docview/1499093923/1429E5C5E084073PQ/2/accountid=15090

Clark, M.C. (1993, May). *Changing course: Initiating the transformational learning process.* Paper presented at the 34th Annual Adult Education Research Conference, University Park, PA. Retrieved from, http://www.adulterc.org/Proceedings.htm.

Clayton, V. P., & Birren, J. E. (1980). The development of wisdom across the life span: A reexamination of an ancient topic. *Life-span development and behavior, 3*, 103-135.

Clifford, R. J. (2007). *Wisdom literature in Mesopotamia and Israel* (No. 36). Atlanta, GA: Society of Biblical Literature.

Clow, D. (2013, April). *MOOCs and the funnel of participation*. Third Conference on Learning Analytics and Knowledge, Leuven, Belgium. Retrieved from http://oro.open.ac.uk/36657/1/DougClow-LAK13-revised-submitted.pdf

Cohen, L., Manion, L., & Morrison, K. (2011). Surveys, longitudinal, cross-sectional and trend studies. In *Research Methods in Education* (7th ed., pp. 261-264). Abingdon-on-Thames, UK: Routledge.

Collard, S., & Law, M. (1989). The limits of perspective transformation: A critique of Mezirow's theory. *Adult Education Quarterly*, *39*(2), 99-107.

Collins, R. (1979) *The credential society*. New York, NY: Academic Press.

Confucius. (2007). *The sayings of Confucius*. Retrieved from http://www.gutenberg.org/files/24055/24055-h/24055-h.htm.

Conrad, D. L. (2002). *Community social presence and engagement in online learning* (Doctoral dissertation). Retrieved from https://search-proquest-com.libproxy.wlu.ca/pqdtglobal/docview/305528560/CA16ABF1ACA240BFPQ/1?accountid=15090

Cooper, J. (2017). *Pursuits of wisdom: Six ways of life in ancient philosophy from Socrates to Plotinus*. Princeton: Princeton University Press.

Cooper, J., & Hutchinson, D. (1997). *Complete works*. Indianapolis, IN.: Hackett.

Courtenay, B., Merriam, S., & Reeves, P. (1998). The centrality of meaning-making in transformational learning: How HIV-positive adults make sense of their lives. *Adult Education Quarterly, 48*(2), 65-84.

Courtenay, B., & Truluck, J. (1997). The meaning of life and older learners: Addressing the fundamental issue through critical thinking and teaching. *Educational Gerontology, 23*(2), 175-195.

Cox, R. M. (1999). *Web of wisdom: A field study of a virtual learning community* (pp. 1-330). Institute of Transpersonal Psychology.

Cranton, P. (1994). *Understanding and promoting transformative learning: A guide for educators of adults.* San Francisco, CA: Jossey-Bass.

Cranton, P. (2006). *Understanding and promoting transformative learning: A guide for educators of adults.* San Francisco, CA: Jossey-Bass.

Cranton, P. (2011) A theory in progress. In S.B. Merriam & A.P. Grace. (Eds.). *The Jossey-Bass reader on contemporary issues in adult education*. San Francisco, CA: Wiley

Cranton, P., & Taylor, E. W. (2012). Transformative learning theory: Seeking a more unified theory. *The handbook of transformative learning: Theory, research, and practice*, 3-20. San Francisco, CA: Wiley.

Csikszentmihalyi, M. (1990). *Flow.* New York, NY: Harper Perennial.

Csikszentmihalyi, M., & Nakamura, J. (2005). The role of emotions in the development of wisdom. In R. J. Sternberg & J. Jordan (Eds.), *A handbook of wisdom: Psychological perspectives* (pp. 220-242). New York, NY: Cambridge.

Csikszentmihalyi, M., & Rathunde, K. (1990). The psychology of wisdom: An evolutionary interpretation. In R. J. Sternberg (Ed.), *Wisdom: Its nature, origins and development* (pp. 25-51). New York, NY: Cambridge.

Cunningham, P.M. (1992). From Friere to feminism: The North American experience with critical pedagogy. *Adult Education Quarterly, 42*(3), 180-191.

Cunningham, P.M. (1998). The social dimension of transformative learning. *PAACE Journal of Lifelong Learning, 7,* 15-28.

Cutler, S. J. (2005). Ageism and technology. *Generations*, *29*(3), 67–72.

Cutler, S. J., Hendricks, J., & Guyer, A. (2003). Age differences in home computer

availability and use. *The Journals of Gerontology*, *58*(5), S271-S280.

Cutts, M. (1995). *The plain English guide*. Oxford: Oxford University Press.

CVU. *Learning online is on the increase*. (2017). Retrieved from http://www.cvu-uvc.ca/news-feed/Learningonlineisontheincrease.php

Czaja, S. J., Charness, N., Dijkstra, K., Fisk, A. D., Rogers, W. A., & Sharit, J. (2006). CREATE common core battery of measures (Technical Report No. CREATE-2006-01). Atlanta, GA: Center for Research and Education on Aging and Technology Enhancement.

Daloz, L.A. (2000). Transformative learning for the common good. In J. Mezirow (Ed.), *Learning as transformation*, (pp. 103-124). San Francisco, CA: Jossey-Bass.

Dalton, A. J. & Janicki, M. P. (1999). *Dementia, aging, and intellectual disabilities: A handbook*. New York, NY: Brunner/Mazel.

DeCarli, C. (2003). Mild cognitive impairment: Prevalence, prognosis, aetiology, and treatment. *The Lancet Neurology*, *2*(1), 15–21.

Delahaye, B.L., & Ehrich, L.C. (2008). Complex learning preferences and strategies of older adults. *Educational Gerontology, 34*(8), 649-662.

Dench, S., & Regan, J. (2000). *Learning in later life: Motivation and impact*. (DfEE Research Brief 183). London, UK: Department for Education and Employment:

Dennen, V. P. (2008). Cognitive apprenticeship in educational practice: Research on scaffolding, modeling, mentoring and coaching as instructional strategies. In D. Jonassen (Ed.), *Handbook of research in educational technology* (pp. 813-828). Mahwah, NJ.

Dewane, C.M. (1994). *Self-help groups and adult learning*, (Doctoral dissertation). Retrieved from https://search-proquest-com.libproxy.wlu.ca/pqdtglobal/docview/618958419/1E15BF19893F4F05PQ/1?accountid=15090

Dewey, J. (1927) *The public and its problems.* New York, NY: Henry Holt.

Dewey, J. (1938). *Experience and education*. New York, NY: Collier Books.

Dore, R. (1976) *The diploma disease*. Berkeley, CA: University of California Press.

Dore, R. (1997) Reflections on the diploma disease twenty years later. *Assessment in Education: Principles, Policy, and Practice*, *4*(1): 189–218.

Drag, L.L., & Bieliauskas, L.A. (2010). Contemporary review 2009: Cognitive aging. *Journal of Geriatric Psychiatry and Neurology*, 23(2), 75-93.

Dron, J. (2007). All about constraints. In *Control and constraint in e-learning: Choosing when to choose*. (pp. 57-76). IGI Global.

Dron, J., Seidel, C., & Litten, G. (2004). Transactional distance in a blended learning environment. *ALT-J, 12*(2), 163-174.

Duff, C. (2009). *Perceptions of belonging among older adult learners in an intergenerational classroom* (Doctoral dissertation). Retrieved from ProQuest Dissertations and Theses database.

Duffy, T. M., & Kirkley, R. (2004). Learning theory and pedagogy in distance learning: The case of Cardean University. In T.M. Duffy & J.R. Kirkley (Eds.), *Learner centered theory and practice in distance education*. Mahwah, NJ: Laurence Erlbaum Associates.

Duke, G. (n.d.) The sophists (ancient Greek). *The Internet encyclopedia of philosophy: A peer-reviewed academic resource.* Retrieved from https://www.iep.utm.edu/sophists/

Dunlap, J. C. & Lowenthal, P. R. (2009). Tweeting the night away: Using Twitter to enhance social presence. *Journal of Information Systems Education, 20*(2), 129-135.

Edmondson, R. (2005). Wisdom in later life: Ethnographic approaches. *Aging & Society*. 25, 339–356.

Edwards, R., Ranson, S., & Strain, M. (2002). Reflexivity: Towards a theory of lifelong learning. *International Journal of Lifelong Education, 21*(6), 525–536.

Ekerdt, D. J. (1986). The busy ethic: Moral continuity between work and retirement. *The Gerontologist*, *26*(3), 239-244.

Ellis, A. (1987). The impossibility of achieving consistently good mental health. *American Psychologist, 42*(4), 364-375.

Emerson, R.W. (2009). *Representative men: Seven lectures*. Waiheke Island, NZ: Floating Press.

Eraut, M. (2002). *Conceptual analysis and research questions: Do the concepts of "learning community" and "community of practice" provide added value?* Annual meeting of the American Educational Research Association, New Orleans, LA.

Erickson, A. (2018). Job and woman wisdom. *Society of Biblical Literature*. Retrieved from http://www.bibleodyssey.net/en/people/related-articles/job-and-woman-wisdom.

Erickson, F. (1986) Qualitative methods in research on teaching. In M.C. Wittrock

(Ed.), *Handbook of research on teaching* (3rd ed). New York, NY: Macmillan.

Erikson, E., & Erikson, J. (1982). *The life cycle completed.* New York, NY: Norton.

Erikson, E. (1993). *Childhood and society*. NY: Norton.

Erikson, E., Erikson, J. & Kivnick, H. (1986). *Vital involvement in old age: The experience of old age in our time.* New York, NY: Norton.

Eurostat. (2015). Internet use statistics: Individuals. Retrieved from http://ec. europa.eu/eurostat/web/information-society/data/database

Farrell, C. (2014). *Unretirement: How baby boomers are changing the way we think about work, community, and the good life*. New York, NY: Bloomsbury Press.

Farmer, C. (2008). *Differences in learning motivations of professionals and nonprofessionals participating in two south Mississippi Institutes for Learning in Retirement,* (Doctoral dissertation). Retrieved from ProQuest Dissertations and Theses database.

Faure, M. (2013). Can Aristotle's phronesis return? The revival of interest in Aristotle's phronesis in political philosophy/theory. *Acata Academia*, *45*(4), 195-235.

Ferrari, M., Abdelaal, Y., Lakhani, S., Sachdeva, S., Tasmim, S., & Sharma, D. (2016). Why is
Gandhi wise? A cross-cultural comparison of Gandhi as an exemplar of wisdom. *Journal of Adult Development, 23*(4), 204-213.

Fielding, M. (2004) Transformative approaches to student voice: Theoretical underpinnings, recalcitrant realities. *British Educational Research Journal*, *30*(2), 295-311.

Findsen, B., & Formosa, M. (2011). *Lifelong learning in later life: A handbook on older adult learning*. Boston, MA: Sense.

Fine, G. (1979). Small groups and culture creation: The idioculture of little league baseball teams. *American Sociological Review, 44*(5), 733-745.

Fine, G. A. (1987). *With the boys: Little league baseball and preadolescent culture*. Chicago, IL: University of Chicago Press.

Finkel, D., Andel, R., Gatz, M., & Pedersen, N. L. (2009). The role of occupational complexity in trajectories of cognitive aging before and after retirement. *Psychology and Aging*, 24, 563– 573.

Firestone, W. A. (1993). Alternative arguments for generalizing from data as applied to qualitative research. *Educational Researcher 22*, 16–23.

Fontaine, C. (1981). A modern look at ancient wisdom: The Instruction of Ptahhotep revisited. *The Biblical Archaeologist, 44*(3), 155-160.

Formosa, M. (2005). Feminism and critical educational gerontology: An agenda for good practice. *Ageing International*, *30*(4), 396-411.

Formosa, M. (2014). Four decades of Universities of the Third Age: Past, present, future. *Ageing & Society*, *34*(1), 42-66.

Frankel, M. S., & Siang, S. (1999). *Ethical and legal aspects of human subject research on the internet*. Washington. Retrieved from http://www.aaas.org/spp/dspp/sfrl/projects/intres/main.htm

Frechette, C., Layne, L.C., & Gunawardena, C.N. (2014). Accounting for culture in instructional design. In I. Jung & C.N. Gunawardena, (Eds.), *Culture and online learning: Global perspectives and research.* Sterling, VA: Stylus Publishing.

Freire, P. (1972). *Pedagogy of the oppressed*. New York, NY: Herder and Herder.

Gafni, R., & Geri, N. (2010). The value of collaborative e-learning: Compulsory versus optional online forum assignments. *Interdisciplinary Journal of E-Learning and Learning Objects, 6,* 335.

Garrison, D. R. (2009). Communities of inquiry in online learning. In *Encyclopedia of Distance Learning, Second Edition* (pp. 352-355). Hershey, PA: IGI Global.

Garrison, D.R., & Akyol, Z. (2013). The community of inquiry theoretical framework. In M.G. Moore (Ed.), *Handbook of distance education.* New York, NY: Routledge.

Garrison, D.R., Anderson, T., & Archer, W. (1999). Critical inquiry in a text-based environment: Computer conferencing in higher education. *The Internet and Higher Education*, *2*(2-3), 87-105.

Garrison, D. R., Anderson, T., & Archer, W. (2003). A theory of critical inquiry in online distance education. *Handbook of distance education, 1,* 113-127.

Garrison, D. R., & Arbaugh, J. B. (2007). Researching the community of inquiry framework: Review, issues, and future directions. *The Internet and Higher Education*, *10*(3), 157-172.

Garrison, D. R., Cleveland-Innes, M., & Fung, T. S. (2010). Exploring causal relationships among teaching, cognitive and social presence: Student perceptions of the community of inquiry framework. *Internet and Higher Education*, *13*(1 2), 31-36.

Gauthier, S., Reisberg, B., Zudig, M., Petersen, R., Ritchie, K., Broich, K, …Winblad, B. (2006). Mild cognitive impairment. *The Lancent, 367*, 9518, p. 1262–1270

Geertz, C. (1973). Thick description: Toward an interpretive theory of culture. In *The interpretation of cultures* (pp. 3-30). New York, NY: Basic Books.

Geri, N., & Gefen, D. (2007). Is there a value paradox of e-learning in MBA programs? *Issues in Informing Science and Information Technology, 4*(1), 163-174.

Gibbs, G. R. (2007). *Analyzing qualitative data*. London, UK: Sage.

Gilligan, C. (1982). *In a different voice: Psychological theory and women's development.* Cambridge, MA: Harvard University Press.

Glück, J., & Bluck, S. (2011). Laypeople's conceptions of wisdom and its development: Cognitive and integrative views. *Journals of Gerontology Series B: Psychological Sciences and Social Sciences, 66B*(3), 321-324.

Glück, J., Strasser, I., & Bluck, S. (2009). Gender differences in implicit theories of wisdom. *Research in Human Development, 6*(1), 27-44.

Goldberg, E., & Beitz, J. (2007). Aging After Retirement. *Activities, Adaptation & Aging, 31*(1), 41-54.

Gorelick, S. (1989). "The changer and the changed: Methodological reflections on studying Jewish feminists. In A.M. Jaggar & S. R. Bordo (Eds), *Gender/body/knowledge: Feminist reconstructions of being and knowing* (pp. 336–358). New Brunswick, NJ: Rutgers University Press.

Guba, E. G. (1990). An alternative paradigm dialogue. In E. G. Guba, *The paradigm dialogue* (pp. 17-30). Newbury Park, CA: Sage.

Guba, E. G., & Lincoln, Y. S. (1994). Competing paradigms in qualitative research. In N. K. Denzin & Y. S. Lincoln (Eds.), *Handbook of qualitative research* (pp. 105-117). London, UK: Sage.

Gullette, M.M. (1997) *Declining to decline: Cultural combat and the politics of the midlife*. Charlottesville, VA: University Press of Virginia.

Gunawardena, C. (2013). Culture and online distance learning. *Handbook of distance education.* (3rd ed.). New York, NY: Routledge.

Gunawardena, C. N. (1995). Social presence theory and implications for interaction and collaborative learning in computer conferences. *International Journal of Educational Telecommunications*, *1*(2/3), 147-166.

Gunawardena, C.N. (2004). The challenge of designing inquiry-based online learning environments: Theory into practice. In T.M. Duffy & J.R. Kirkley (Eds.), *Learner centered theory and practice in distance education* (pp. 143–157). Mahwah, NJ: Lawrence Erlbaum.

Gunawardena, C., Frechette, C., & Layne, L. (2019). *Culturally inclusive instructional design: A framework and guide to building online wisdom communities*. New York, NY: Routledge.

Gunawardena, C. N., Hermans, M. B., Sanchez, D., Richmond, C., Bohley, M., & Tuttle, R. (2009). A theoretical framework for building online communities of practice with social networking tools. *Educational Media International*, *46*(1), 3-16.

Gunawardena, C.N., Jennings, B., Ortegano-Layne, L., Frechette, C., Carabajal, K., Lindemann, K., & Mummert, J. (2004). Building an online wisdom community: A transformational design model. *Journal of Computing in Higher Education*, *15*(2), 40-62.

Gunawardena, C.N., Ortegano-Layne, L., Frechette, C., Carabajal, K, Lindemann, K., & Jennings, B. (2006). New model, New strategies: Instructional design for building online wisdom communities. *Distance Education, 27*(2), 217-232.

Habermas, J. (1971). *Knowledge and human interests.* Boston, MA: Beacon Press.

Hagood, E. W., & Gruenewald, T. L. (2018). Positive versus negative priming of older adults' generative value: Do negative messages impair memory? *Aging & Mental Health*, 22, 257–260

Hallet, R.E., & Barber, K. (2014). Ethnographic research in a cyber era. *Journal of Contemporary Ethnography*, *43*(3), 306–330.

Halverson, C. (2002). Activity Theory and Distributed Cognition: Or What Does CSCW Need to DO with Theories? *Computer Supported Cooperative Work (CSCW), 11*(1-2), 243-267.

Hancock, D. R., & Algozzine, B. (2016). *Doing case study research: A practical guide for beginning researchers*. Teachers College Press.

Hatton, P. (2008). *Contradiction in the book of Proverbs: The deep waters of counsel*. Burlington, VT: Ashgate.

Hebestreit, L. (2008). The role of the University of the Third Age in meeting the needs of adult learners in Victoria, Australia. *Australian Journal of Adult Learning, 48*, (3), 547–565.

Hietaluoma, A. (2008) *3rd Age University of Jyväskylä FIN*. Retrieved from www.elgpn.eu/.../finnish-eu...3rd-age-university-of-jyvaskyla-finland.../file

Hine, C. (2008) Virtual ethnography: Modes, varieties, affordances. In N. Fielding, R. Lee, & G. Blank, *The Sage handbook of online research methods*. Los Angeles, CA: Sage.

Hodkinson, P. (2005). ‘‘Insider research’’ in the study of youth cultures. *Journal of Youth Studies, 8*(2), 131–149.

Holliday, S.G., & Chandler, M.J. (1986) *Wisdom: Explorations in human competence*. New York, NY: Karger.

Holmberg (1995). *Theory and practice of distance education*. New York, NY: Routledge.

Hopson, B., & Adams, J. (1976). Towards an understanding of transition: Defining some boundaries of transition dynamics. In J. Adams, J. Hayes, & Hopson, B. (Eds.), *Transition. Understanding and managing personal change*, (pp. 3-25). London, UK: Martin Robertson.

Houle, C. O. (1974). The changing goals of education in the perspective of lifelong learning. *International Review of Education,* 430-46.

Hu, C. S., Ferrari, M., Liu, R. D., Gao, Q., & Weare, E. (2016). Mainland Chinese implicit theory of wisdom: Generational and cultural differences. *The Journals of Gerontology: Series B, 73*(8), 1416-1424.

Hudson, R. B., & Gonyea, J. G. (2012). Baby boomers and the shifting political construction of old age. *The Gerontologist*, 52(2), 272-282.

Hultsch, D. F., Hertzog, C., Small, B.J., & Dixon, R.A. (1999). Use it or lose it: Engaged lifestyle as a buffer of cognitive decline in aging? *Psychology and Aging*, *14*(2), 245-263.

Hunter, A., Lusardi, P., Zucker, D., Jacelon, C., & Chandler, G. (2002). Making meaning: The creative component in qualitative research. *Qualitative Health Research, 12*(3), 388-398.

Hutchins, E. (1991). The social organization of distributed cognition. In L. B. Resnick, J. M. Levine, & S. D. Teasley (Eds.), *Perspectives on socially shared cognition* (pp. 283-307). Washington, DC,: American Psychological Association.

Illingworth, N. (2006). Content, Context, Reflexivity and the Qualitative Research Encounter: Telling Stories in the Virtual Realm. *Sociological Research Online*, *11*(1), 1-12.

Jackson, A.Y. & Mazzei, L.A. (2009) *Voice in qualitative inquiry. Challenging conventional, interpretive, and critical conceptions in qualitative research*. London, UK: Routledge.

Jackson, J., Hill, P., Payne, B., Roberts, B., Stine-Morrow, E., & Duberstein, P. (2012). Can an old dog learn (and want to experience) new tricks? Cognitive training increases openness to experience in older adults. *Psychology and Aging*, *27*(2), 286-292.

Jamieson, A. (2012). Learning in later adulthood: Transitions and engagement in formal study. *Educational Gerontology, 38*(3), 201-211.

Janiero, G, & Jacob, L. (2014). RUTIS. *Association of Third Age Universities Network.* Retrieved from www.utwlubsko.com.pl/addtofav/files/apresentacao_rutis_ingles.ppt.

Jenkins, J. A. (2015). Disrupting aging. *Generations*, *39*(1), 6.

Jonassen, D. H. (1994). Thinking technology: Toward a constructivist design model. *Educational Technology, 34*(4), 34-37.

Jonassen, D. H. (1997). Instructional design models for well-structured and ill-structured problem-solving learning outcomes. *Educational Technology Research and Development, 45*(1), 65-94.

Johnson-Bailey, J., & Alfred, M. (2006). Transformational teaching and the practices of black women adult educators. *New Directions for Adult and Continuing Education, 2006*(109), 49-58.

Jones, K.E. (2010). *Ancient words in modern times: Feminist reinterpretations of wisdom.* (Master's thesis). Retrieved from https://search-proquest-com.libproxy.wlu.ca/pqdtglobal/docview/734608414/E5A2716757D94514PQ/1?accountid=15090

Jordan, J. (2005). The quest for wisdom in adulthood: A psychological perspective. In R. J. Sternberg & J. Jordan (Eds.), *A handbook of wisdom: Psychological perspectives* (pp. 160-188). New York, NY: Cambridge.

Juris, J. (2007). Practicing militant ethnography with the movement for global resistance (MRG) in Barcelona. In S. Shukaitis and D. Graeber, (Eds.), *Constituent Imaginations* (pp. 164–178). Oakland, CA: AK Press.

Kasl, E., & Yorks, L. (2002). Collaborative inquiry for adult learning. *New Directions for Adult and Continuing Education, 2002*(94), 3-12.

Kearns, L.R., & Frey, B.A. (2010). Web 2.0 technologies and back channel communication in an online learning community. *TechTrends: Linking Research and Practice to Improve Learning, 54*(4), 41-51.

Kegan, R. (2000). What “form” transforms? A constructive-developmental approach to transformative learning. In *Contemporary theories of learning* (pp. 35-52). New York, NY: Routledge.

Kim, A., & Merriam, S. B. (2004). Motivations for learning among older adults in a learning in retirement institute. *Educational Gerontology, 30(6),* 441-445.

Kinkead, S. (2015). *On becoming a crone* (Doctoral dissertation). Retrieved from https://search-proquest-com.libproxy.wlu.ca/pqdtglobal/docview/1668131302/fulltextPDF/E59D1915442748E5PQ/1?accountid=15090

Kirchner, C., Bock, O., & Völker, I. (2017). The effects of priming with age stereotypes on a PC-based mail-sorting task. *Ergonomics*, *60*(4), 512-517.

Kitchenham, A. (2008). The evolution of John Mezirow's transformative learning theory. *Journal of Transformative Education*, *6*(2), 104-123.

Knight, A. J., & Parr, W. V. (1999). Age as a factor in judgments of wisdom and creativity. *New Zealand Journal of Psychology*, *28*(1), 37.

Kokkos, A. (2019). Critical thinking in older adult education: The contribution of aesthetic experience. *International Journal of Education and Ageing, 3,* 137-149.

Krafcik, D. (2015). Words from the wise: Exploring the lives, qualities, and opinions of wisdom exemplars. *Integral Review: A Transdisciplinary & Transcultural Journal for New Thought, Research, & Praxis*, *11*(2), 7-35.

Kuh, G. D. (1995). The other curriculum: Out-of-class experiences associated with student learning and personal development. *The Journal of Higher Education*, *66*(2), 123-155.

Kunzmann, U., & Baltes, B. (2003). Wisdom-related knowledge: Affective, motivational, and interpersonal correlates. *Personality and Social Psychology Bulletin*, *29*(9), 1104-1119.

Kunzmann, U., & Baltes, P. B. (2005). The psychology of wisdom: Theoretical and empirical challenges. In R. J. Sternberg & J. Jordan (Eds.), A handbook of wisdom: Psychological perspectives (pp. 110-135). New York, NY: Cambridge.

Labouvie-Vief, G., & Blanchard-Fields, F. (1982). Cognitive ageing and psychological growth. In *Ageing and society* (Vol. 2, pp. 183-209). Cambridge, UK: Cambridge.

Lachman, M. (2004). Development in midlife. *Annual Review of Psychology 55*(1), 305-316.

Lamb, R. & Brady, E. M. (2005). Participation in lifelong learning institutes: What turns members on? *Adult Education Quarterly*, *54*(2), 121–139.

Lambert, W.G. (1960) *Babylonian wisdom literature*. Oxford: Clarendon Press.

Landri, P., & Marques da Silva, S. (2013). *Rethinking Educational Ethnography: Researching on-line communities and interactions*. Proceedings of the 2nd Annual Rethinking Educational Ethnography Conference, Barcelona, Spain, Universitat de Barcelona. Retrieved from http://diginole.lib.fsu.edu/islandora/object/fsu:183823/datastream/PDF/view

Lange, E. A. (2004). Transformative and restorative learning: A vital dialectic for sustainable societies. *Adult Education Quarterly*, *54*(2), 121-139.

Laslett, P. (1987). The emergence of the Third Age. *Ageing and Society*, 7. 133-160.

Laumakis, J. (2014). *The font of life:(Fons vitae)*. Milwaukee, WI: Marquette University Press.

Lave, J., & Wenger, E. (1991). *Situated learning: Legitimate peripheral participation.* Cambridge, UK: Cambridge.

Lawrence, R. L. (2012). Transformative learning through artistic expression: Getting out of our heads. *The handbook of transformative learning: Theory, research, and practice*, 471-485.

LeCompte, M. D., & Schensul, J. J. (1999). *Designing and conducting ethnographic research.* Plymouth, UK: AltaMira Press.

LeCompte, M.D., & Schensul, J. (2013). *Analysis and interpretation of ethnographic data: A mixed methods approach* (2nd ed.). Lanham, Md.: AltaMira.

Lee, J. (2012). Patterns of interaction and participation in a large online course: Strategies for fostering sustainable discussion. *Journal of Educational Technology & Society, 15*(1), 260-272.

Lee, S. (2014). Korean mature women students' various subjectivities in relation to their motivation for higher education: Generational differences amongst women. *International Journal of Lifelong Education, 33*(6), 791-810.

Lee, Y. (2016). From learners to volunteers: A qualitative study of retirees' transformative learning in Taiwan. *Educational Gerontology, 42*(12), 809-817.

Lenstra, N. (2017). The community-based information infrastructure of older adult digital learning. *Nordicom Review, 38*(S1), 65-77.

Leung, R., Tang, C., Haddad, S., Mcgrenere, J., Graf, P., & Ingriany, V. (2012). How older adults learn to use mobile devices: Survey and field investigations. *ACM Transactions on Accessible Computing, 4*(3), 1-33.

Levinson, D. J., Darrow, C. N., Klein, E. B., Levinson, M. H., & McKee, B. (1978). *The seasons of a man's life*. New York, NY: Alfred A. Knopf.

Levy, B. (1996). Improving memory in old age through implicit self-stereotyping. *Journal of Personality and Social Psychology, 71*(6), 1092-1107.

Libarkin, J.C., & Kurdziel, J.P. (2002). Research methodologies in science education: The qualitative-quantitative debate. *Journal of Geoscience Education,50*(1), 78-86.

Li, J. (2008). Ethical challenges in participant observation: A reflection on ethnographic work. *The Qualitative Report*, *13*(1), 100-115.

Li, L. C., Grimshaw, J. M., Nielsen, C., Judd, M., Coyte, P. C., & Graham, I. D. (2009). Use of communities of practice in business and health care sectors: A systematic review. *Implementation science*, *4*(1), 27.

Li, N., & Kirkup, G. (2007). Gender and cultural differences in internet use: A study of China and the UK. *Computers and Education, 48*(2), 301-317.

Li, Q. (2006). Computer-mediated communication: A meta-analysis of male and female attitudes and behaviors. *International Journal on E-Learning, 5*, 525-570.

Lin, X., & Wang, C. H. (2015). Exploring predictive factors influencing returning international and American adult learners' motivational orientations. *International Research in Higher Education, 1*(1), 1-8.

Lincoln, Y., & Guba, E. (1985). *Naturalistic inquiry*. Newbury Park, CA: Sage.

Lindsay, R.M., & Ehrenberg, A.S.C. (1993). The design of replicated studies. *The American Statistician, 47*(3), 217-228.

Lipman, M. (1991). *Thinking in education.* Cambridge, UK: Cambridge.

Marcinkiewicz, A. (2011). The University of the Third Age as an institution counteracting marginalization of older people. *Journal of Education Culture and Society, 2*, 38-44.

Markham, A. (2003). Critical junctures and ethical choices in internet ethnography. In M. Thorseth (Ed.), *Applied ethics in internet research* (pp. 51-63). Trondheim, Norway: NTNU University Press.

Markham, A. (2005). The methods, politics, and ethics of representation in online ethnography. In N. Denzin, & Y. Lincoln (Eds.), *Handbook of qualitative research* (3rd ed., pp. 793-820). Thousand Oaks, CA: Sage.

Martinson, M., & Berridge, C. (2015). Successful aging and its discontents: A systematic review of the social gerontology literature. *The Gerontologist*, *55*(1), 58-69.

Martinson, M., & Minkler, M. (2006). Civic engagement and older adults: A critical perspective. *The Gerontologist, 46*, 318-324.

Mason, J. (2002). *Researching your own practice: The discipline of noticing*. London, UK: Routledge.

McAdams, D. P. (2001). The psychology of life stories. *Review of General Psychology*, *5*(2), 100-122.

McAdams, D. P., & de St Aubin, E. (1998). *Generativity and adult development*. Washington, DC: APA.

McClusky, H. Y. (1971). Education: Background Issues. *White House Conference on Aging*. Washington, D.C.: Government Printing Office.

McDonald, L. (2006). The welfare of women and retirement. In L. Stone (Ed.), *New frontiers of research about retirement and other later-life transitions* (pp. 137–164). Ottawa, ON: Statistics Canada.

McDonough, C. C. (2016). The effect of ageism on the digital divide among older adults. *Journal of Gerontology and Geriatric Medicine, 2*(8),1-7.

McWilliams, S. (2013). *Choosing learning in later life: Constructions of age and identity among lifelong learners.* (Doctoral Dissertation). Retrieved from http://diginole.lib.fsu.edu/islandora/object/fsu:183823/datastream/PDF/view

Merriam, S. B. (2004). The role of cognitive development in Mezirow's transformational learning theory. *Adult Education Quarterly, 55*(1), 60–68.

Merriam, S. B., Courtenay, B., & Baumgartner, L. (2003). On becoming a witch: Learning in a marginalized community of practice. *Adult Education Quarterly*, *53*(3), 170-188.

Merriam, S. B., & Ntseane, G. (2008). Transformational learning in Botswana: How culture shapes the process. *Adult Education Quarterly*, *58*(3), 183-197.

Mezirow, J. (1978a). *Education for perspective transformation: Women's re-entry programs in community colleges.* New York, NY: Columbia University.

Mezirow, J. (1978b). Perspective transformation. *Adult education*, *28*(2), 100-110.

Mezirow, J. (1981). A critical theory of adult learning and education. *Adult Education*, *32*(1), 3-24.

Mezirow, J. (1990). *Fostering critical reflection in adulthood*. San Francisco, CA: Jossey-

Bass.

Mezirow, J. (1991). *Transformative dimensions of adult learning.* San Francisco, CA: Jossey-Bass

Mezirow, J. (1994). Understanding transformation theory. *Adult Education Quarterly*, *44*(4), 222-232

Mezirow, J. (1995) Transformation theory of adult learning. In M.R. Welton, (Ed.), *In defense of the lifeworld: Critical perspectives on adult learning* (pp. 39-70). Albany, NY: SUNY Press.

Mezirow, J. (1996). Contemporary paradigms of learning. *Adult Education Quarterly, 46*(2), 158-172.

Mezirow, J. (1997). Transformative learning: Theory to practice. *New Directions for Adult and Continuing Education, 74*, 5-12.

Mezirow, J. (1998). On critical reflection. *Adult Education Quarterly, 48(3),*185-199.

Mezirow, J. (2000). Learning to think like an adult: Core concepts of transformation theory. In *Learning as transformation: Critical perspectives on a theory in progress,* (pp. 3-32). San Francisco, CA: Jossey-Bass.

Mezirow, J. (2003). Transformative learning as discourse. *Journal of Transformative Education*, *1*(1), 58-63.

Mezirow, J. (2008). An overview on transformative learning. In *Lifelong learning* (pp. 40-54). NY: Routledge.

Miles, M. B., & Huberman, A. M. (1994). *Qualitative data analysis*. Thousand Oaks, CA: Sage.

Miller, J.B. (1986) Toward a new psychology of women. (2nd ed). Boston, MA: Beacon Press.

Mitzner, T. L., Boron, J. B., Fausset, C. B., Adams, A. E., Charness, N., Czaja, S. J.,… Sharit, J. (2010). Older adults talk technology: Technology usage and attitudes. *Computers in Human Behavior, 26*(6), 1710-1721.

Misco, T. (2007). The frustrations of reader generalizability and grounded theory: Alternative considerations for transferability. *Journal of Research Practice* 3, 1–11.

Mohd-Nor, N. (2011). Understanding older adult learners in distance education: The case of Universiti Sains Malaysia. *The Turkish Online Journal of Distance Education, 12* (3), 229 – 240.

Moltmann-Wendel, E. (2012). The return of wisdom. *Theology Today, 69*(2), 156-165.

Montaigne, M. (1952). The essays of Michel Eyquem de Montaigne (C. Cotton, Trans., & W.C. Hazlitt, Ed.). In R. M. Hutchins (Ed.), *Great books of the Western world* (Vol. 25). Chicago: William Beneton.

Moody, H.R. (1976). Philosophical presuppositions of education for old age, *Educational Gerontology, 1*(l), 1-15.

Moody, H.R. (1986). Late-life learning in the information society. In D.A. Peterson, J.E. Thornton & J.E. Birren (Eds.), *Education and aging* (pp. 122–148). Englewood Cliffs, NJ: Prentice-Hall.

Moody, H.R. (1990) Education and the life cycle: A philosophy of aging. In R.H. Sharron & D.B. Lumsden (Eds.), *Introduction to educational gerontology*, (3rd ed.), pp. 23-40. New York, NY: Taylor and Francis.

Moody, H. R., & Sasser, J. R. (2017). *Student resources*. Los Angeles CA: Sage.

Moore, M. (1989). Three types of interaction. *American Journal of Distance Education, 3*(2), 1-6.

Moore, M. (1991): Editorial: Distance education theory. *American Journal of Distance Education, 5*(3), 1-6.

Moore, M. (1993). Theory of transactional distance: The evolution of theory in distance education. In D. Keegan, (Ed.), *Theoretical principles of distance education*, (pp. 22-38). London, UK: Routledge.

Moore, M. G. (2007). The theory of transactional distance. In M. G. Moore (Ed.), *Handbook of distance education,* (pp. 89-105). Mahwah, NJ: Lawrence Erlbaum.

Moore, M. G. (2013). The Theory of Transactional Distance. In *Handbook of distance education,* (pp. 84-103). Abingdon-on-Thames, UK: Routledge.

Moran, J. (2018). Aristotle on eudaimonia ('happiness'). *Think, 17*(48), 91-99.

Morante, A., Djenidi, V., Clark, H., & West, S. (2017). Gender differences in online participation: Examining a history and a mathematics open foundation online course. *Australian Journal of Adult Learning, 57*(2), 266-293.

Morrison, G. R., Ross, S. M., Kalman, H. K., & Kemp, J. E. (2012). *Designing effective instruction*. Hoboken, NJ: Wiley.

Murphy, S. L. (2011). Update on geriatric research in productive aging. *AJOT: American Journal of Occupational Therapy, 65*(2), 197-206.

Nordqvist, J. (2013, July). Being mentally active helps preserve memory. *Medical News Today*. Retrieved from http://www.medicalnewstoday.com/articles/262883.php

Ojo, B. A. (2010). Transformative online education and social equality: The prospects for e-governance and democracy in Africa. In K. Gulsun & T. V. Yuzer (Eds.), *Transformative online education and liberation: Models for social equality* (pp.

145–161). Hershey, PA:
Information Science Reference.

Olive, J. (2014). Reflecting on the tensions between emic and etic perspectives in life history research: Lessons learned. *Forum Qualitative Social Research, 15*(2), 46-55.

Onyx, J., & Baker, E. (2006). Retirement expectations: Gender differences and partner effects in an Australian employer-funded sample. *Australasian Journal on Ageing*, *25*(2), 80-83.

Or, C. K. L., & Karsh, B.T. (2009). A systematic review of patient acceptance of consumer health information technology. *Journal of the American Medical Informatics Association*, *16*(4), 550-560.

Opalinski, L. (2001). Older adults and the digital divide: Assessing results of an online survey. *Journal of Technology in Human Services*, *18*(3-4), 203-221.

O'Reilly, P., & Caro, F. (1994). Productive aging: An overview of the literature. *Journal of Aging & Social Policy, 6*(3), 39-71.

Parkhe, A. (1993). 'Messy' research, methodological predispositions, and theory. *Academy of Management Review, 18*(2), 227–268.

Partlow, K. M., & Gibbs, W. J. (2003). Indicators of constructivist principles in Internet-based courses. *Journal of Computing in Higher Education*, *14*(2), 68.

Pasupathi, M., & Staudinger, U. (2001). Do advanced moral reasoners also show wisdom? Linking moral reasoning and wisdom-related knowledge and judgement. *International Journal of Behavioral Development, 25*(5), 401-415.

Pea, R. D. (1993). Practices of distributed intelligence and design for education. In G. Salomon (Ed.), *Distributed cognition: Psychological and educational considerations* (pp. 47–86). Cambridge, UK: Cambridge.

Peterson, D. A., Thornton, J. E., & Birren, J. E. (1986). *Education and aging*. Englewood Cliffs, NJ: Prentice Hall.

Peterson, D. A., & Wendt, P. F. (1990). Gerontology instruction: Different models for different results. *Educational Gerontology*, *16*(4), 359-372.

Picton, C, & Yuen, C. (1998). Educational interests and motivations of older adult learners: A comparative study between Australia and China. *Ageing International*, 97/98, 24-45.

Posner, C. (2006). The task of the bow: Heraclitus' rhetorical critique of epic language. *Philosophy & Rhetoric*, *39*(1), 1-21.

Price, C. A. (2002). Retirement for women: The impact of employment. *Journal of Women & Aging*, *14*(3-4), 41-57.

Pritzl, K. (1985). On the Way to Wisdom in Heraclitus. *Phoenix*, *39*(4), 303-316.

Ray, R. E. (2004). Toward the croning of feminist gerontology. *Journal of Aging Studies*, *18*(1), 109-121.

Reja, U., Manfreda, K. L., Hlebec, V., & Vehovar, V. (2003). Open-ended vs. close-ended questions in web questionnaires. *Developments in Applied Statistics*, *19*(1), 160-117.

Rice, E. (1958). The Renaissance idea of wisdom. *Harvard historical monographs, 37*. Cambridge, MA: Harvard University Press.

Rivera, J. (2005). Finding Aristotle's golden mean: Social justice and academic excellence. *Journal of Education, 186*(1), 79-85.

Rohwedder, S., & Willis, R. J. (2010). Mental Retirement. *The Journal of Economic Perspectives*, 24, 119– 138.

Ross, D. (2007). *Distributed cognition and the will: Individual volition and social context*. Cambridge, MA: MIT Press.

Rose, E. (2013). On reflection: An essay on technology, education, and the status of thought in the twenty-first century. Toronto, ON: Canadian Scholars' Press.

Rossman, G. B., & Rallis, S. F. (2003). *Learning in the field: An introduction to qualitative research*. Thousand Oaks, CA: Sage.

Rourke, L., Anderson, T., Garrison, R., & Archer, W. (2001). Methodological issues in the content analysis of computer conference transcripts. *International Journal of Artificial Intelligence in Education, 12*, (1), 8-22.

Rovai, A. P. (2007). Facilitating online discussions effectively. *The Internet and Higher Education*, *10*, 77–88.

Rowe, J., & Kahn, R. (1998). *Successful aging*. New York, NY: Random House.

Rowe, J., & Kahn, R. (2015). Successful aging 2.0: Conceptual expansions for the 21st century. *Journals of Gerontology Series B: Psychological Sciences and Social Sciences, 70*(4), 593-596.

Saldaña, J. (2013). *The coding manual for qualitative researchers* (2nd ed.). Thousand Oaks, CA: Sage.

Salomon, G. (1993). No distribution without individual's cognition: A dynamic interactional view. In G. Salomon (Ed.), *Distributed cognitions: Psychological and educational considerations* (pp. 111–138). Cambridge, UK: Cambridge.

Samuelson, P. L., Jarvinen, M. J., Paulus, T. B., Church, I. M., Hardy, S. A., & Barrett, J. L. (2015). Implicit theories of intellectual virtues and vices: A focus on intellectual humility. *The Journal of Positive Psychology, 10*(5), 389-406.

Schaefer, J. L. (2009). *Older baby boomers seeking collegiate degrees: Developmental influences on educational and vocational aspirations*. (Doctoral Dissertation). Retrieved from http://search.proquest.com/docview/304907252?accountid=15090

Schaie, K. W. (2005). *Developmental influences on adult intelligence: The Seattle longitudinal study*. New York, NY: Oxford University Press.

Schollmeier, P. (1989). Aristotle on practical wisdom. *Zeitschrift Für Philosophische Forschung, 43*(1), 124-132.

Schön, D. A. (2017). *The reflective practitioner: How professionals think in action*. London, UK: Routledge.

Schwier, R.A., & Seaton, J. X. (2013). A comparison of participation patterns in selected formal, non-formal, and informal online learning environments. *Canadian Journal of Learning and Technology, 39*(1), 1-15.

Scott, S. & Palinscar, A. (2013). Sociocultural theory. Retrieved from http://www.education.com/reference/article/sociocultural-theory/.

Seligman, M., & Csikszentmihalyi, M. (2000). Positive psychology. An introduction. *The American Psychologist, 55*(1), 5-14.

Shapira, N., Barak, A., & Gal, I. (2007). Promoting older adults' well-being through Internet training and use. *Aging & Mental Health, 11*(5), 477-84.

Sharf, B. (1999). Beyond netiquette: The ethics of doing naturalistic discourse research on the internet. In S. Jones, *Doing internet research: Critical issues and methods for examining the Net* (pp. 243-257). Thousand Oaks, CA: Sage.

Sinkovics, R., & Alfoldi, R. (2012). Progressive Focusing and Trustworthiness in Qualitative Research. *Management International Review, 52*(6), 817-845.

Simmons, B., & Betschild, M. (2001). Women's retirement, work and life paths: Changes, disruptions and discontinuities. *Journal of Women & Aging, 13*(4), 53-70.

Simpson, W. K. (1986), *Papyrus Reisner IV: Personnel accounts of the early Twelfth Dynasty*. Boston, MA: Museum of Fine Arts.

Smith, D. (1990). A fresh map of life: The emergence of the third age. *Social History of Medicine, 3*(3), 462-463.

Smith, E. (2011). Teaching critical reflection. *Teaching in Higher Education, 16*(2), 211-223.

Spaid-Ross, M., & Sax, Caren L. (2015). *A phenomenological study of the older adult learner's community college experience,* (Doctoral dissertation). Retrieved from http://sdsu-dspace.calstate.edu/bitstream/handle/10211.3/143675/SpaidRoss_sdsu_0220D_10847.pdf;sequence=1

Sperazza, L., & Banerjee, P. (2010). Baby Boomers and seniors: Understanding their leisure values enhances programs. *Activities, Adaptation & Aging, 34*(3), 196-215.

Spigner-Littles, D., & Anderson, C.E. (1999). Constructivism: A paradigm for older learners. *Educational Gerontology, 25*(3), 203-209.

Spindler, G., & Spindler, L. (1992). Cultural process and ethnography: An anthropological perspective. In M. D. LeCompte, W. L. Millroy, & J. Preissle (Eds.), The handbook of qualitative research in education, (pp. 53-92). London, UK: Academic Press.

Stake, R. (2010). *Qualitative research: Studying how things work*. New York, NY: Guilford Press.

Staudinger, U. M. (1999a). Social cognition and a psychological approach to an art of life. In F. Blanchard-Fields & T. Hess (Eds.), *Social cognition, adult development and aging* (pp. 343–375). New York, NY: Academic Press

Staudinger, U. M. (1999b). Older and wiser? Integrating results on the relationship between age and wisdom-related performance. *International Journal of Behavioural Development*, *23*(3), 641-664.

Staudinger, U. & Baltes, P.B. (1994). The psychology of wisdom. In R.J. Sternberg (Ed.), *Encyclopedia of intelligence* (pp. 1143-1152). New York, NY: Macmillan.

Staudinger, U. M., Dorner, J., & Mickler, C. (2005). Wisdom and personality. In R. J. Sternberg & J. Jordan (Eds.), *A handbook of wisdom: Psychological perspectives* (pp. 191-219). Cambridge, UK: Cambridge.

Staudinger, U. M., Smith, J., & Baltes, P. B. (1994). *Manual for the assessment of wisdom-related knowledge.* Berlin, Germany: Max Planck Institute for Human Development and Education.

Sternberg, R. J. (1995). Wisdom: relations to intelligence and creativity. In R.J. Sternberg (Ed.), *Wisdom: Its nature, origins, and development*. Cambridge, UK: Cambridge University Press, pp. 142-159.

Sternberg, R. J. (1998). A balance theory of wisdom. *Review of General Psychology, 2,* 347-365.

Sternberg, R. J. (2001). Why schools should teach for wisdom: The balance theory of wisdom in educational settings. *Educational Psychologist, 36*(4), 227-245.

Sternberg, R. J. (2004). What is wisdom and how can we develop it? *The Annals of the American Academy of Political and Social Science*, *591*(1), 164-174.

Sternberg, R., & Sherman, S.J. (1985). Implicit theories of intelligence, creativity, and wisdom. *Journal of Personality and Social Psychology, 49*(3), 607-627.

Stewart, M. (2018). Cognitive presence in FYC: Collaborative learning that supports individual authoring. *Composition Forum, 38*, 1-16.

Strickland-Hughes, C., West, R., Smith, K., & Ebner, N. (2017). False feedback and beliefs influence name recall in younger and older adults. *Memory, 25*(8), 1072-1088.

Surowiecki, J. (2004). *The wisdom of crowds: Why the many are smarter than the few and how collective wisdom shapes business, economies, societies and nations* (1st ed.). New York, NY: Doubleday.

Sveinunggaard, K. (1993). *Transformative learning in adulthood: A socio-contextual perspective.* Paper presented at the 35th Annual Adult Education Research Conference, University Park, IL, Pennsylvania State University.

Swindell, R. (2002). U3A online: A virtual university of the third age for isolated older people. *International Journal of Lifelong Education, 21*(5), 414-429.

Swindell, R., Grimbeek, P., & Heffernan, J. (2010). U3A online and successful aging: A smart way to help bridge. In J. Soar, R. Swindell, & P. Tsang (Eds.), *Intelligent technologies for bridging the grey digital divide* (pp. 122-140). Hershey, NY: Information Science Reference.

Takahashi, M., & Bordia, P. (2000). The concept of wisdom: A cross-cultural comparison. *International Journal of Psychology, 35*(1), 1-9.

Takahashi, M., & Overton, W.F. (2005). Cultural foundations of wisdom: An integrated developmental approach. In R. J. Sternberg & J. Jordan (Eds.), *A handbook of wisdom: Psychological perspectives* (pp. 32-60). New York, NY: Cambridge.

Taylor, E.W. (1997). Building upon a theoretical debate: A critical review of the empirical studies of Mezirow's transformative learning theory. *Adult Education Quarterly, 48*(1), 34-59.

Taylor, E.W. (1998). The theory and practice of transformative learning: A critical review. *ERIC Clearinghouse on Adult, Career, and Vocational Education, 374.* Retrieved from http://eric.ed.gov/ERICDocs/data/ricdocs2sql/content_storage_01/0000019b/80/15/cc/Od.pdf

Taylor, E. W. (2000). Analyzing research on transformative learning theory. In J. Mezirow and Associates (Eds.), *Learning as transformation: Critical perspectives on a theory in progress*

(pp. 285-328). San Francisco, CA: Jossey-Bass.

Taylor, E.W. (2007). An update of transformative learning theory: A critical review of the empirical research (1999-2005). *International Journal of Lifelong Education*, 26, 173–191.

Tennant, M. & Pogson, P. (1995). Learning and change in the adult years: A developmental perspective. San Francisco, CA: Jossey-Bass.

Thornton, J. E. (1987). Lifespan learning and education. In D. Peterson, J. Thornton, & J. Birren (Eds.), *Education and aging* (pp. 114-124). Englewood Cliffs, NJ: Prentice Hall.

Thornton, J. E. (2002). Myths of aging or ageist stereotypes. *Educational gerontology*, *28*(4), 301-312.

Thorpe, M. (2002). From independent learning to collaborative learning: New communities of practice in open, distance, and distributed learning. In M. Lea & K. Nicoll (Eds.), *Distributed learning: Social and cultural approaches to practice* (pp. 131-151). London, UK: Routledge.

Tisdell, E.J. (2008). Critical media literacy and transformative literacy. *Journal of Transformative Education, 6*, 1, 49-67.

Tomei, L.A. (2006). The impact of online teaching on faculty load: Computing the ideal class size for online courses. *Journal of Technology and Teacher Education*, *14*(3), 531–541.

Tornstam, L. (2005). *Gerotranscendence: A developmental theory of positive aging*. New York, NY: Springer.

Truluck, J. E. & Courtenay, B. C. (1999). Learning style preferences among older

adults. *Educational Gerontology, 25*, 221–236.

Turcotte, M. (2015, November). Women and education. *Statistics Canada*. Retrieved from http://www.statcan.gc.ca/pub/89-503-x/2010001/article/11542-eng.htm

Twigg, C. A. (2001). Innovations in online learning. *Moving beyond no significant difference. The PEW Learning and Technology Program.* Troy, NY: Center for Academic Transformation.

Uncles, M.D., & Kwok, S. (2013). Designing research with in-built differentiated replication. *Journal of Business Research, 66* (9), 1398–1405.

UNESCO Institute for Statistics. (2014). *Women in higher education.* Retrieved from http://www.uis.unesco.org/Education/Pages/women-higher-education.aspx

Vaillant, G. E. (2012). Positive mental health: Is there a cross-cultural definition? *World Psychiatry*, *11*(2), 93-99.

van Deursen, A. J. & van Dijk, J. A. (2015). Toward a multifaceted model of internet access for understanding digital divides: An empirical investigation. *The Information Society, 31*(5), 379-391.

Vinten, G. (1987). The participant observer. *The Internal Auditor, 44*(6), 25.

Verstynen, P. (2011). *Exploring the language of older adult learners as they discuss beginning a bachelor's degree program.* (Doctoral dissertation). Retrieved from https://digitalrepository.unm.edu/oils_etds/36/

Vygotsky, L. S. (1978). *Mind in society.* Cambridge, MA: Harvard University Press.

Wardle, H. G., & Blasco, P. (2007). *How to read ethnography*. Florence, KY: Routledge.

Wenger, E. (1998). *Communities of practice.* Cambridge, UK: Cambridge.

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

Wertsch, J. V. (1991). *Voices of the mind: A sociocultural approach to mediated action.* Cambridge, MA: Harvard University Press.

Weststrate, N.M. (2017). *The examined life: Relations among life experience, self-reflection, and wisdom.* (Doctoral Dissertation). Retrieved from https://tspace.library.utoronto.ca/handle/1807/80666

Wheelwright, P. (1959). *Heraclitus*. Princeton, NJ: Princeton University Press.

Whitehead, A.N. (1959). *The aims of education and other essays* (2nd ed.). London, UK: E. Benn.

Wiessner, C.A., & Mezirow, J. (2000). Theory building and the search for common ground. In J. Mezirow (Ed.), *Learning as transformation: Critical perspectives on a theory in progress* (pp. 329-358). San Francisco, CA: Jossey-Bass.

Wilson, R. S., De Leon, C. F. M., Barnes, L. L., Schneider, J. A., Bienias, J. L., Evans, D. A., & Bennett, D. A. (2002). Participation in cognitively stimulating activities and risk of incident Alzheimer disease. *Jama*, *287*(6), 742-748.

Wise, A., Hausknecht, S. N., & Zhao, Y. (2014a). Attending to others' posts in asynchronous discussions: Learners' online "listening" and its relationship to speaking. *International Journal of Computer-Supported Collaborative Learning*, *9*(2), 185-209.

Wise, A., Zhao, Y., & Hausknecht, S. (2014b). Learning analytics for online discussions: Embedded and extracted approaches. *Journal of Learning Analytics*, *1*(2), 48-71.

Wolf, M.A. (2009). Older adult women learners in transition. *New Directions for Adult and Continuing Education, 122,* 53-62.

Woods, T. (2005). *How the Catholic church built Western civilization*. Washington, DC : Lanham, MD: Regnery.

Woodward, K. (2003). Against wisdom: The social politics of anger and aging. *Journal of Aging Studies, 17*, 55–67.

Xie, B. (2011). Older adults, e-Health literacy, and collaborative learning: An experimental study. *Journal of the American Society for Information Science and Technology*, *62*(5), 933-946.

Yee, G. A. (1992). The theology of creation in Proverbs 8:22-31. In R. J. Clifford & J. J. Collins (Eds.), *Creation in the biblical traditions,* (pp. 85-96). Washington, DC: Catholic Biblical Association of America.

Yin, R.K. (2010). *Qualitative research from start to finish.* New York, NY: The Guilford Press.

Yoo, S., & Huang, W. (2013). Engaging online adult learners in higher education: Motivational factors impacted by gender, age, and prior experiences. *The Journal of Continuing Higher Education, 61*(3), 151-164.

Zielińska-Więczkowska H. (2017). Correlations between satisfaction with life and selected personal resources among students of Universities of the Third Age. *Clinical Interventions in Aging, 12,* 1391-1399.

Appendix A: Recruitment

Recruitment Poster Template (for student use)

PARTICIPANTS NEEDED FOR RESEARCH IN DISTANCE EDUCATION

We are looking for volunteers to take part in a study of
Wisdom development through online education

As a participant in this study, you would be given the opportunity to take a six-week, discussion-based, online course called ***Wisdom.*** Time commitment will be approximately one hour per week.

In this course you will be reading about wisdom and wisdom development, then participating in forum discussions with other students in the easy-to-use learning management system (Moodle). There will be no tests. We are only interested in your opinions and ideas about the themes presented.

By participating in this study you will help us to understand the potential of computer mediated education to foster wisdom among older adult learners.

To learn more about this study, or to participate in this study, please contact:

Principal Investigator: Lynn Farquhar lafarquhar@gmail.com

This study is supervised by: Dr. Dianne Conrad

This study has been reviewed by the Athabasca University Research Ethics Board.

Athabasca University

Appendix B: Informed Consent

Working Title: Seeding Wisdom Online in a U3A

PARTICIPANT CONSENT FORM

Principal Researcher: Lynn Farquhar lafarquhar@gmail.com 1 905 541 9133

Supervisor: Dr. Dianne Conrad diannec@athabascau.ca

You are invited to participate in a research study about the development of wisdom through distance education. I am conducting this study as a requirement to complete my Doctorate in Distance Education.

As a participant, you are asked to take part in an online course plus a voluntary follow-up survey and interview about your experiences during a course on wisdom development. Participation will involve an online course that lasts for six weeks on a part-time basis online. It will require that you devote approximately one to three hours per week, at your discretion and at your leisure, to online study and communicating with other students and the study facilitator asynchronously.

Involvement in this study is entirely voluntary and you may refuse to answer any questions you are not comfortable sharing. You may withdraw from the study at any time during the data collection period by simply sending an email indicating that you will leave the course. No explanation will be required.

If you agree to participate in a follow-up interview, which I intend to transcribe, I will provide you with the transcript for verification of accuracy via email or through the regular post at your request. You will be given a period of one month from the date of receiving this transcript to respond with feedback and/or changes.

Results of this study may be disseminated in conferences and through published academic papers. The names of participants and the school where the course was based will be changed in order to protect the identity of those involved.

If you have any questions about this study or require further information, please contact Lynn Farquhar or Dianne Conrad using the contact information above.

This study has been reviewed by the Athabasca University Research Ethics Board. Should you have any comments or concerns regarding your treatment as a participant in this study, please contact the Office of Research Ethics at 1-800-788-9041, ext. 6718 or by e-mail to rebsec@athabascau.ca.

Thank you for your participation in this project.

CONSENT:

I have read the Letter of Information regarding this research study, and all of my questions have been answered to my satisfaction. By returning this form I indicate my agreement to participate and that the following is understood.

- I understand the expectations and requirements of my participation in the research;
- I understand the provisions around confidentiality and anonymity;
- I understand that my participation is voluntary, and that I am free to withdraw at any time with no negative consequences;
- I am aware that I may contact the researcher, Dianne Conrad, or the Office of Research Ethics if I have any questions, concerns or complaints about the research procedures.

Furthermore,

- I am granting permission for the researcher to use an audio recorder
- I acknowledge that the researcher may use specific quotations of mine, without identifying me
- I am granting permission for the researcher to attribute my name to any quotes used

_____I would like to receive a copy of the results of this research study by

e-mail address:
_____

or

mailing address:
_____

If you are willing to have the researcher contact you at a later time by e-mail or telephone for a brief conversation to confirm that I have accurately understood your comments in the interview, please indicate so below. You will not be contacted more than six months after your interview.

_____ Yes, I would be willing to be contacted.

Appendix C: Pre-course Questionnaire

Thank you for taking the time to complete this survey. If any question makes you uncomfortable, feel free to leave it blank. Your answers will be kept in confidence and will be used to develop a profile of the participants in this study.
Thank you!

1. What year were you born? _____
2. What is your gender? _____
3. What is your main place of residence? _____
4. What is your highest level of formal education? (**check one)**
   - Self-study / non-formal education
   - High school graduate
   - Trade/apprenticeship completion
   - College/university graduate
   - M.A. or professional designation
   - Doctoral degree completion
5. What is your marital status? Married/Partnered Single Divorced Never married/Single
6. Employment status Full-time Part-time Retired

Appendix D: Survey and Interview Questions

Thank you for taking the time to complete this survey. If any question makes you uncomfortable, feel free to leave it blank / not to answer. Your answers will be kept in confidence.

1. What is the reason you decided to take this course? For example, was there some piece of knowledge you hoped to acquire?

2. At what point during this course did you feel the most engaged or interested, and why?

3. Do you believe that any of your thoughts, opinions, or assumptions have changed as the result of this course on wisdom? If yes, please share the details (for example: what has changed and why you believe it has changed).

4. Some courses are easier to follow than others because of the way the lessons flow. Please describe your opinion of how the lessons in this course worked together.

5. Please provide any other remarks that might help me to understand your experience of this course of study.

Appendix E: Participant Demographics

Age	Gender	Education	Marital status	Employment
76	F	College/university	widow	retired
77	F	College/university	divorced	retired
69	F	MA/professional	married	retired
70	F	College/university	married	retired
80	F	College/university	widow	retired
74	F	High school	married	retired
74	F	College/university	married	retired
79	F	College/university	widow	retired
83	M	High school	divorced	No answer
75	F	College/university	married	retired
81	F	College/university	married	retired
73	M	Trade school	widower	retired
82	F	College/university	widow	retired
84	F	College/university	married	retired
72	F	High school	married	retired
76	F	College/university	Single/never married	retired
73	F	High school	married	retired

Appendix F: Ethics Approval

Athabasca University
RESEARCH CENTRE

CERTIFICATION OF ETHICAL APPROVAL

The Athabasca University Research Ethics Board (AUREB) has reviewed and approved the research project noted below. The AUREB is constituted and operates in accordance with the current version of the Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans (TCPS) and Athabasca University Policy and Procedures.

Ethics File No.: **22716**

Principal Investigator:

Ms. Lynn Farquhar, Graduate Student

Centre for Distance Education\Master of Education in Distance Education

Supervisor:

Dr. Dianne Conrad (Supervisor), Centre for Distance Education

Project Title:

Seeding Wisdom Online in a U3A

Effective Date: October 12, 2017 **Expiry Date**: October 11, 2018

Restrictions:

Any modification or amendment to the approved research must be submitted to the AUREB for approval.

Ethical approval is valid *for a period of one year*. An annual request for renewal must be submitted and approved by the above expiry date if a project is ongoing beyond one year. A Project Completion (Final) Report must be submitted when the research is complete *(i.e. all participant contact and data collection is concluded, no follow-up with participants is anticipated and findings have been made available/provided to participants (if applicable))* or the research is terminated.

Approved by: **Date:** October 12, 2017

Debra Hoven, Chair

Centre for Distance Education, Departmental Ethics Review Committee

Athabasca University Research Ethics Board
University Research Services, Research Centre
1 University Drive, Athabasca AB Canada T9S 3A3
E-mail rebsec@athabascau.ca
Telephone: 780.675.6718

Athabasca University
FACULTY OF GRADUATE STUDIES

The future of learning.

Appendix G: Approval of Dissertation

Approval of Dissertation

The undersigned certify that they have read the dissertation entitled

WEB OF WISCOM:
AN ETHNOGRAPHIC CASE STUDY OF OLDER ADULT LEARNERS ONLINE

Submitted by:

Lynn A. Farquhar

In partial fulfillment of the requirements for the degree of

Doctor of Education in Distance Education

The examination committee certifies that the dissertation
and the oral examination is approved

Supervisor:
Dr. Dianne Conrad
Athabasca University

Committee Members:
Dr. Bob Heller
Athabasca University

Dr. Cynthia Blodgett-Griffen
Athabasca University

External Examiner:
Dr. Walter Archer
University of Alberta

October 15, 2019

1 University Drive, Athabasca, AB, T9S 3A3 Canada
P: 780.675-6821 | Toll-free (CAN/U.S.) 1.800.788.9041 (6821)
fgs@athabascau.ca | fgs.athabascau.ca | athabascau.ca