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The Journey Continues: Life Transitions and Adult Learning Among the Older Women in a Continuing Care Retirement Community

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Abstract: This study explores older women's experiences of moving and living in a continuing care retirement community. The focus is on adult learning involved in the process of adaptation. The findings suggest that transformative learning theory and continuity theory partially explain the process of successful adaptation.

Purpose of Study

A housing change signifies a drastic change in many dimensions of older adults' lives, and the relocation from one's home may involve considerable disruption especially among the elderly who have been accustomed to a house for many years. Nevertheless, change and disruption also provide opportunities for learning and development. The purpose of this study was to investigate whether adult learning was involved in the adaptation process among elderly women who recently moved to a continuing care retirement community (CCRC). Learning in this study did not only include strategies and skills used by the female residents but also the meaning they created for their new residential experiences.

Theoretical Frameworks

Past studies on retirement living focused on the social aspects of residential life after housing changes had been made. Little is known about the effect of residents' past life experiences on the process of adapting to a new living environment. Information about past experiences can provide insights into the residents' present patterns of adaptation and the meaning they create for their new residential experiences. The aspects of adult learning and development experienced by the residents after moving into a retirement home were also left unexplored in previous research. To investigate the life-long process of change and development in older adults, the life-course approach was used in this study for collecting information (Silverman, 1987).

Two theoretical frameworks were used as the point of departure for understanding the residential experiences of elderly women living in a CCRC. Continuity theory, a social theory on aging, explains how an individual adapts to changes in physical, biological, and social situations (Achley, 1988). Studies in gerontology indicate that the desire to establish a sense of continuity becomes stronger as one ages (Hazan, 1994). Continuity theory may offer explanations about the impact of past life experiences in elderly women's residential experiences.

Mezirow's theory of perspective transformation (Mezirow, 1991) provides understanding about how adult learning and development are parts of the process experienced by the female residents of CCRC in their adaptation processes. Starting with a disorienting dilemma and moving to the

final phase of a transformed perspective about one's life, the process of transformative learning may explain how an elderly woman makes meaning of her new residential experience and assimilates the new meaning into a more integrated world view. How an adult develops an inclusive perspective about his or her life is an indication of adult development.

Research Design

A purposive sample was selected for this research. Five female participants were recruited through a sign-up sheet posted at Northwood, a CCRC in a Midwest college town. The participants were identified as white and middle-class women who have lived in Northwood less than one and a half years. Life history narratives were used to understand how participants constructed their lives with the emphasis on how they dealt with and attributed meaning to critical life events throughout their life course. This type of information enabled me to understand the pattern of dealing with life changes developed by each participant, which was essential to gain insights into their residential experiences.

Data were collected through unstructured, person to person interviews, accompanied by an interview guide (Johnson-Bailey & Cervero, 1996). Each participant was interviewed five to six times, each time for approximately 40-90 minutes. All interviews were taped for analysis. Interview transcripts were returned to participants for clarifying comments. The constant comparative method was employed for data analysis (Patton, 1990). The steps included reading all transcripts for general meaning, coding, categorizing the codes, contrasting and comparing the categories for emergent themes, reviewing the data and sharing the data with the participants.

Findings

The analysis of data reveals five emergent themes--the contexts of participants' decisions, why Northwood, difficulties experienced during the transition period, factors contributing to successful adaptation, and the journey continues.

The contexts of participants= decisions

The participants' past life experiences, personal goals, and anticipations for their future life created a context for participants to make their decisions of moving to Northwood. The impact of the participants' past life experiences was evident. The salient example shared by the participants was the experience of being caregivers for their parents or relatives. Most participants perceived the experiences as traumatic or difficult. The experiences had a profound impact on the participants' decisions of moving to a CCRC. Moving to a retirement living center avoided the participants becoming a burden for their adult children or relatives and maintained their goals of being independent as well. The anticipation of future health decline created a need for security, which contributed to the participants' decision of moving. While the early critical life experiences created the context for the participants to plan for future moving, more recent stressful life events created another context in which the participants made the actual move. None of the participants in this study planned to move into Northwood at the time they registered for a vacancy. Instead, most of the participants waited until they encountered more recent

stressful life events that propelled them to make the final decision of moving. The events included increasing frailty, inability to take care of their property and the loss of loved ones.

The implication of these two contexts is similar to what Taylor (1994) described as the context of readiness. The participants were mentally ready as they moved into Northwood. The more ready the participants were in terms of moving to Northwood, the greater sense of satisfaction they would obtain after they moved.

Why Northwood

The reasons the participants chose Northwood over other CCRCs can be grouped into three main categories -- family reasons, locale factors, and past residential experiences. All the participants have close relationships with their family members. They chose Northwood because they wanted to be with their family who either live in Northwood or in neighboring areas. Some participants are long-time residents in the college town where Northwood is located. Unwilling to interrupt their established support network and social activities, the participants chose Northwood in order to maintain a sense of familiarity. The third category, past residential experiences, reflects that the participants sought a new living environment that was congruent with their past residential experiences. The unique architecture of Northwood divides a three-story building into six atria. Each atrium consists of six apartments. The atrium system promotes interactions between residents and creates a homey atmosphere. The structure of Northwood, which yields a generous outdoor space, makes it stand out from other high-rise and motel-like CCRCs. These attributes are appealing to most of the residents who came from small towns or were accustomed to spacious living space.

The reasons that the participants chose Northwood seem to explain the participants' desire to maintain external continuity (Atchley, 1988) by establishing a coherence of their support networks, social activities, and residential environment. This sense of continuity is critical because it results in a sense of satisfaction and well-being (Wheeler, 1996).

Difficulties experienced during the transitional period

The transitional period is defined as the time after the participants decided to move and before they settled down in Northwood. This period can be further divided into three stages--the preparing stage, the moving-in stage, and the settling-in stage. Each stage presented various challenges to the participants. The most common difficulty in the preparing stage is the lack of time and physical energy to get ready for moving. This was especially hard for the unmarried participants who generally had less help from family members. Another common challenge was the decision concerning possessions. Deciding what to bring to Northwood in order to fit into the limited space can be a stressful task for those who established sentimental attachments to their possessions. Giving the valuable and meaningful items to family members solved the dilemma. The tasks faced by the participants in the moving-in stage were similar to those in the preparing stage. The participants were physically challenged to organize their apartments. This stage usually lasted from several weeks to a month.

While the difficulties experienced in the first two stages were likely to be solved after the participants moved in, the challenges in the settling stage took a longer time to manage. By now, the reality of living in a new place set in and the participants found themselves faced with several problems -- limited storage space, no attached garage, a fixed laundry schedule, and pressure to dress more formally. Most of the participants gradually adapted to the new way of living, while some still felt unsettled.

Overall, the participants did not perceive the difficulties they encountered as detrimental to their satisfaction and well-being. They moved into Northwood because of their needs for security and social support. As these needs were fulfilled, the other obstacles seem to be insignificant. In addition, the participants gradually became accustomed to the structure of life in Northwood and began to enjoy the benefits of it. These enjoyable experiences generally override the obstacles they were facing.

Factors contributing to successful adaptation

In general, life in Northwood was perceived as satisfying by the participants. They all seemed to adapt to the new life in Northwood quickly and successfully. The most cited enjoyable experience of living in Northwood is the sense of security provided by Northwood. Knowing they would be taken care of for the rest of their lives surpasses the challenges and difficulties resulting from changes. The variety of activities and the homey atmosphere created by the residents make the new life at Northwood a pleasant experience. Based on the participants' accounts, the factors contributing to successful adaptation are as follows:

Sense of readiness. As stated previously, the contexts in which the participants made their decisions to move created a sense of readiness. The participants were ready for changes as they moved into Northwood. This anticipation of change and the determination to face the life transition facilitated successful adaptation.

Support from family members. Living close to family members was one of the major reasons the participants chose Northwood. The support from the family members is important as it provides a source of comfort and stability for the participants in the time of transition. The support can be categorized as social, physical and psychological support.

Maintaining continuity. The desire to maintain some kind of continuity in life is evident among the participants. They chose Northwood to continue the close ties with their family, to maintain their social networks, and to match their residential preferences. After they moved into Northwood, they continued most of the activities and hobbies they were familiar with even though the environment had changed. Yet maintaining continuity does not mean engaging in the exact same activities. The participants in this study were able to revise the mode of their activities by adding flexibility to fit their new circumstances better.

Learning to adapt. Learning was evident in the process of adaptation. Instrumental learning (Mezirow, 1995) and behavioral learning (Taylor, 1994) were employed by the participants in this study. Instrumental learning included reading the publication of Northwood to understand

the rules and regulations. This type of learning was critical in the early stage of transition as the participants were still in the phase of familiarizing themselves with the new environment.

Behavioral learning included the acts of serving on committees, volunteering, participating in social activities, developing new hobbies, making new friends with other residents, and conforming to the cultures and customs of Northwood. Each participant in the study employed at least two modes of behavioral learning. Generally this type of learning is the most effective and satisfying approach to successful adaptation as the participants enjoyed the social and recreational aspects of the learning.

The journey continues

All participants viewed Northwood as the last stage of their lives. Yet they did not come with the attitude of waiting for their final destiny passively. Instead, they moved into Northwood in order to enjoy their lives without the worry of burdening their family members and taking care of property. The degree to which they were actively engaged after moving into Northwood varied according to personal goals and health status. While some participants desired to remain active and productive, some hoped they could just maintain their current health status and the activities they enjoy.

No perspective transformation is evident among the participants in the study. All participants perceived no significant change in their lives and themselves after they moved into

Northwood. They believe their attitudes toward themselves, their lives, and deaths remain the same.

Conclusions and Discussions

Three general conclusions were drawn from the findings. First, the findings suggest that residential change is not a source of disruption and stress in life as indicated in past studies. Instead, moving into a CCRC provides a solution for previously existing dilemmas the participants encountered. The environmental change signifies another stage of life that the participants in this study were ready to embrace.

Second, the study demonstrates that elderly people are dynamic individuals who constantly evaluate their changing needs. In this study, the participants were proactive in responding to their increasing needs for security, social support, and environmental consistency. They planned ahead and initiated the residential change that increased their personal control and life satisfaction (Kahana & Kahana, 1996). They also actively employed various types of learning to facilitate their adaptations. The result of their proactive adaptation in late life is the successful maintenance of continuity and a sense of well-being.

Third, both continuity theory and transformative learning theory explain the participants' experiences of relocation and adaptation partially. Continuity theory recognizes the importance of past experiences on the decision to change one's residence. These prior experiences created a context in which the participants made their decisions in order to maintain external and internal

continuity (Atchly, 1988). Transformative learning theory seems to overlook the critical role of early life experiences in participants' decision-making and adaptation process. The participants were mentally ready for residential change and life transition, which in turn contributed to their successful adaptation.

Both theories recognize the proactive aspect of human adaptation. Continuity cannot be achieved if individuals fail to actively pursue it as they go through daily existence and interpret the circumstances with which they deal (Myerhoff, 1979). While continuity theory seem to identify the proactive aspect of adaptation, transformative learning theory focuses more on the learning aspect of adaptation. The theory provides an insight into the process of how participants learn to adapt to a new living environment.

Implications

The findings of the study indicate that continuity theory and transformative learning theory are both valid yet insufficient to explain the participants' experience of moving and adaptation. The study provides insights into both theories. It is evident from the findings that the development of a new model integrating multiple theories across disciplines is needed for gaining insights into older women's aging experiences.

Knowing how elderly residents adapt to a new living environment will guide decisions about the kinds of assistance and programming helpful to the new residents in the process of adaptation. The study identifies three phases during which the participants encountered most of their difficulties. Although the administration of CCRCs cannot help the residents select their possessions or sell their property, they can help the residents settle in more easily. For example, the existing welcome committee can extend their function. The members of the committee can serve as correspondents or informants for new residents. They can provide insiders' tips and strategies for newcomers to make the transition less stressful.

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