Abstract: Using four research projects, the authors have identified several characteristics of third aged individuals that can influence their sense of life satisfaction as defined in Bernice Neugarten’s theoretical framework developed fifty years ago as part of the Kansas City Study of Adult Life. Both quantitative and qualitative research areas are identified as ripe for additional investigation for researchers in adult education and other fields of study. The importance of research into this area is affirmed and the use of a highly reliable and valid instrument is available, the Life Satisfaction Index for the Third Age (LSITA).

Introduction

The authors have been involved in four research projects on the topic of Life Satisfaction using both quantitative and qualitative methodologies. The three quantitative studies have involved 1660 participants and the one qualitative project included 25 informants. The data and evidence from these projects as well as the current literature were probed using statistical and other analytical techniques to address the following research questions: What are individual characteristics and behaviors that can lead to greater life satisfaction and an improved sense of successful aging?

Happiness and life satisfaction have been topics of popular and scientific interest for several decades. In 1998, the incoming president of the American Psychological Association (APA), Martin Seligman, selected the development of research into what made individuals feel fulfilled, engaged and meaningfully happy as the theme of his year as the APA president. Psychology researchers responded to the APA president’s call for a greater emphasis on the investigation of enabling conditions that make human beings flourish (Wallis, 2005). Seligman indicated that “I realized that my profession was half baked. It wasn’t enough for us to nullify disabling conditions and get to zero. We needed to ask, what are the enabling conditions that make human beings flourish? How do we get from zero to plus five?” (Wallis, 2005, p. A1). Measurement tools that assess positive characteristics would be necessary in this search for mental fitness. In January 2005, Time Magazine selected “The Science of Happiness” for its annual special mind and body theme issue. Five years later the Journal of Gerontology: Psychological Sciences celebrated its 65th year and, in its hallmark issue, reviewed manuscript topics for the years 2000-2008. It reported that 17.4% of the 437 articles dealt with well-being as either a primary, secondary or tertiary subject making it the second most frequent focus area (Blieszner & Sanford, 2010). The subjective well-being of individuals over 55 continues to be an important research topic. And there are many areas that can be explored to both to identify what affects an individual’s sense of life satisfaction and to better understand the underlying theoretical framework of successful aging.

Theoretical Framework

The theoretical framework that was used in the four research projects was derived from the work of Bernice Neugarten and her colleagues in the Kansas City Study of Adult Life.
Conducted over fifty years ago, the study sought to develop a self-assessment instrument that could be used to measure successful aging in individuals over the age of fifty five. Based on interviews of over two hundred respondents and the analysis of the resulting evidence, the researchers identified five components of the construct designated life satisfaction as follows:

**Zest vs. apathy.** The first rating scale, *zest vs. apathy*, relates to an enthusiasm of response to life in general and was not related to any specific type of activity, such as social or intellectual engagements. A subject who was enthusiastic about sitting home reading was scored as high as an energetic person was on this scale. Physical energy as well as intellectual energy and other highly involved pursuits contributed to a high score (Neugarten et al., 1961).

**Resolution and fortitude.** The *resolution and fortitude* scale measures the respondents’ active acceptance of personal responsibility for their lives rather than passively accepting or condoning what has happened to them. Erikson’s integrity is similar in conceptualization and relates to the meaningfulness of life and the lack of fear of death. Either taking too much self-blame or placing too much responsibility on others or the world in general would result in a low score on this component (Neugarten et al., 1961).

**Congruence between desired and achieved goals.** The third contributor to Neugarten’s concept of life satisfaction is the perception of *congruence between desired and achieved goals*. The relative difference between desired and achieved goals caused one to be satisfied or dissatisfied with life in this rating (Neugarten et al., 1961).

**Self-concept.** A comprehensive assessment of *self-concept* in all of the dimensions including emotional, physical, and intellectual was used in establishing this score. This factor is based on one’s present emotional, physical, and intellectual dimensions. Persons who do not feel old but are concerned with their appearance and judge themselves to be wise and competent tend to rate themselves higher on this factor. Past successful living may contribute to this component but only indirectly. Someone who thinks that the best is behind them and that they are not worthwhile will tend to score lower on the self-concept scale (Neugarten et al., 1961).

**Mood tone.** The final factor, *mood tone*, relates to optimism and happiness and other positive affective responses. Depression, sadness loneliness, irritability, and pessimism are feelings that would result in very low scores. Assessing life satisfaction is more complex than just measuring happiness but happiness with the present life state is an important contributor in LSR and LSI-A (Neugarten et al., 1961).

**Research Projects**

Four research projects and the evidence and data that they have developed have been used to address the research questions. They were, first, the study of the relationship between participation in adult learning events and life satisfaction using the original LSIA developed by Bernice Neugarten and her colleagues. This consisted of data from 885 adult participants in third age learning events. (Murk et al., 2000) Second, twenty-four of these participants were interviewed with the goal of enriching the understanding of the quantitative results (Murk et al., 2000) Third, a new instrument development study with 654 participants resulted in a more reliable and valid measure of successful aging, the Life Satisfaction Index for the Third Age, and an additional set of data to assist in addressing these proposed research questions. And, fourth and last, the LSITA was used in a study of first year Career and Technical Education high school faculty undergoing training and the mentors assisting in that training. This study was an effort to
determine the perceived overall Life Satisfaction of both the students and the mentors and measure any differences (Nickolich et al., 2010)

While all of these research projects have been reported, the research questions that were addressed used the theoretical framework to understand a concept other than successful aging itself or they had a specific narrow scope of inquiry. This analysis intends to use the evidence and data to enrich our understanding of the construct of successful aging and to suggest areas that would be potentially fruitful for additional research efforts.

**Methodology**

The quantitative data were subjected to correlation analysis to discover relationships that would address the research questions. The authors also formed an expert panel to analyze the qualitative research and findings for their specific impact on the life satisfaction and the adult education relationship.

**Findings**

The Murk et al. initial study used the original LSIA developed in 1961 and did not find any statistically significant demographic correlates with the LISA. In that study, the reliability of the LSIA was calculated at .77 which was approximately the average of the reliabilities calculated by Wallace and Wheeler. They found 157 research studies that had used a form of the LSIA and computed a reliability of .79 from 34 of these research projects that provided the data that could be used to determine a calculated average (2002). While this level of reliability is adequate for many purposes, a higher degree of reliability is desired for co-relational research.

In fact, the second study reported several statistically significant demographic correlates using the LSITA with a reliability of .935 with a similar sample population. In fact all but one of the demographic variables looked at in both studies was not a statistically significant correlate to successful aging as measured by the LSITA scale. Age, monthly income, marital status, the response to the item “with whom do you live” and the responses to the self-assessment items about financial status, health status, and activity level status correlated with the LSITA scores at the .01 probability level and employment status at the .05 level (See Table 1).

<table>
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<th>Demographic Characteristic</th>
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<tr>
<td>Age</td>
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<td>.01</td>
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<tr>
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Table 1: Demographic characteristics and correlations to LSITA (N= 533)
These data demonstrate a positive relationship between income and level of education and life satisfaction as measured by the LSITA. Income was measured as the reported monthly income in dollars and education level was reported a range from elementary to doctorate in an increasing scale. Thus the greater the reported income and the higher the attained education level the greater the life satisfaction.

The characteristic of employment status was assessed by responses of full time to retired and a negative correlation would seem indicate that greater opportunity for leisure i.e. retirement was not as strong as the income opportunity provided by working. The relationship of marital status and LISTA, measured from married to an increasing score at widowed and divorced, would demonstrate that married individuals are more life satisfied with the negative correlation result. The characteristic of Living Arrangement was a response to the question “With whom do you live?” seeking to understand the level of independence of the respondent. The level of independence is directly correlated with scores on the LSITA since a lower score on this item meant more independence.

Finally, data collected included three status questions: health, financial and activity. All three are the most strongly correlated with LISTA scores and indicate that the better the individual felt about the status the higher the sense of life satisfaction. In summary, the demographic data from the LSITA development study indicate that a number of characteristics are at least somewhat associated with a positive sense of life satisfaction: income, continuing to work, educational attainment, having a spouse to live with, and a greater degree of good health, financial security, and a higher level of activity. Also, however, the older age one achieves, the less life satisfaction is realized. These findings raise additional research opportunities which will be discussed in the conclusion of the paper as well as insights from the other two studies.

The qualitative leg of the initial Murk et al. research effort involved structured face to face and telephone interviews of twenty-five of the survey respondents using fourteen open ended questions. The objective of the interviews was to deepen the understanding of the following research questions:

1) How do life circumstances influence lifelong learning among Third Age Learners?
2) Does life satisfaction among Third Age Learners impact their desire for lifelong learning?
3) Are Third Age Learners increasing their life satisfaction through continuing learning programs?

The participants included seventeen Caucasian females and eight males from ten Midwestern states who participated in Third Age Programs (Elderhostel, OASIS, and Learning Events). The average age of the participants was 69 years and the majority lived in urban areas. Their educational levels ranged from high school graduates to doctorates and most were currently married had two or more children and four or more grandchildren.

For many, family was described as the most important concept / theme in their lives. Many of the participants continued to work at least part time, while others volunteered in church activities, soup kitchens, Habitat for Humanity, and reading for the blind. Two former professors continued with their lifelong interest by reviewing books, articles, and authoring books. Gardening, painting, recreational activities, golfing, fishing and camping were activities that held great interest for these participants. Many were physically active and engaged in routine exercise activities. Reading books was considered important to them. The learners reported that television and radio played a relative small part in their lives although education programs and National Public Radio (NPR) were often mentioned as their favorites.
When asked about the happiest and saddest moments in their lives the answers tended to revolve around family and relationships. Happiest moments included family get-togethers, weddings, births, reunions and vacations. The saddest times usually involved the death of a spouse, parent, child, or other relatives, or dear friends. Disappointment in life tended to relate to educational activities e.g. not going to college, not obtaining a degree, but also included the loss of physical activities or decreased mobility. When asked about meeting their life expectations, most responded that they had met or even exceeded their life expectations. Some respondents were disappointed in their children’s life choices. Others were disappointed that they had postponed many of their goals and expectations to a later time due to familial responsibilities or financial circumstances. All of the participants had strong lifelong educational goals.

Some wanted to travel and learn about other countries and cultures, while others wanted to learn more about computers and technologies. All but those with limited eyesight wanted to continue reading books of all kinds; fiction, nonfiction, biographies, self help books and professional and educational journals. Most felt that they would continue in some formal learning experiences such as Elderhostel. Others returned to school to make career changes or for advancing in a second career.

The results from the qualitative study indicated that Third Age learners 1). Value cognitive reordering and engagement in new venues through active participation. 2) Have a commitment to lifelong learning that is present throughout their lives, and not limited to any specific events. 3) Are future oriented and directed. 4) Are committed to remaining physically, emotional, and cognitively healthy (as demonstrated by maintaining their current levels of functioning). 5) Demonstrated fulfillment through altruistic behaviors (engaged through family, neighborhood, social, and community activities). 6) Valued social interactions through family and collegial relationships and through group and educational activities.

The implication of the qualitative part of the study included that Adult Educators and Education Gerontologist should continue to be aware of the importance of providing stimulating educational challenges which allows for the development of learners as individuals. The study provided an intimate understanding of the personal circumstance for many Third Age Learners. This deeper understanding can enhance and enrich education practitioners’ abilities to design and direct program targeted to Third Age Learners.

The final study for review involved administering the LSITA to 60 first year Workplace Specialist I faculty and 45 mentors with at least 5 years teaching experience taking part in a teacher training project. The mentors demonstrated higher life satisfaction as measured by the LSITA than the first year teachers. While the difference was statistically significant, the degree of difference was relatively modest and both the teachers and their mentors had higher than average scores on the LSITA with a mean score for the first year teachers of 156 and the mentors 162 and both 158.5. The ages of the participants were lower than the 55 years old and over on which the theoretical framework was based but it was felt that the instrument would produce replicable results. The 105 participants had 67 individuals under 50 years of age.

Conclusions and Recommendations for Researchers

The public and professional literature shows that the interest in understanding the concepts related to successful aging continues with many challenges still to be met. The authors have identified several opportunities for research applications based on the quantitative and/or qualitative use of Neugarten’s theoretical framework. The LSITA is in the public domain and
can re reliably and validly used in program evaluation studies, in co-relational research with attempts to discover relationships that can promote or impair an individual’s life satisfaction, or in experimental designs that can test these same types of relationships. For example, life review programs can evaluate their outcomes, or a large group of participants in a variety of activities that include reminiscence as part of their programming can use several scales to determine relationships, or a life review with two groups can be measured in an experimental design.

For more details on the experimental design, a researcher could randomly divide a group of retirement community participants in a life review program into two groups of 20. Both groups would participate in the review sessions but Group 1 would go through the process first and then have the LSITA administered to them. Group 2 would have the LISTA administered and then participate in the life review. In this fashion, you have a treatment group and a control group to compare results but all get to participate in the life review.

The practitioner can also use the theoretical framework as the basis for an interview evidence gathering process to identify nuances in aspects of the theory of successful aging. Such questions as how and how long does the death of a spouse effect the life satisfaction of the widow or widower, or the death of a child or grandchild. There are five constructs related to life satisfaction in the theoretical framework that can be independently explored. Or the question of the difference between how men and women differ in their perception of life satisfaction would be worthwhile to research. Even if there is no statistically significant difference between their scores there may be dramatic differences in how they get to their scores.

In addition, while the LSITA, LSIA and their theoretical framework were developed with individuals over the age of fifty-five and in the Mid West of the United States, the instruments have been used in studies with a much more diverse age and culture with a good deal of success (Wallace & Wheeler, 2002).

And teachers and other individuals involved in adult education can rest assured that the principles of adult education in regard to designing programs for self-directed learners and to make the instruction relevant and meaningful to the student are compatible with achieving higher life satisfaction. They should also design research projects to assess those teaching strategies that will increase the attainment of successful aging.

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