

WEB-BASED LIFELONG LEARNING DURING THE PANDEMIC

THE USE OF WEB-BASED VIDEOCONFERENCING FOR LIFELONG LEARNERS
DURING THE CORONAVIRUS DISEASE PANDEMIC

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Lay Abstract

This study investigated how older adults, who pursue lifelong learning in-person, have interpreted their transition to online learning because of COVID-19 pandemic meeting restrictions. Lifelong learners have had to transition from in-person learning to virtual formats, which has encouraged new older adults to become lifelong learners, and also for some lifelong learners to drop out of the practice entirely. The key goal of the study was to describe the Transitioners, New learners, and Dropout learners' experience with lifelong learning with respect to COVID-19's impacts on their participation. Interviews were conducted with individuals who fell into these three categories and, through their responses, distinct dialogues emerged to describe their motivation to participate in lifelong learning, and their opinions on using technology as a means to access it. Confirming the motives to participate and how technology is appreciated by lifelong learners enables us to better develop and implement lifelong learning.

Abstract

My thesis explores older adult lifelong learners' experiences in transitioning their continued education participation to an online model. This research acknowledges and situates itself in the geragogy contexts of older adult learners, drawing on their experiences of the pandemic and lifelong learning, in addition to their opinions on education for older adults.

As such, a case study methodology was employed so that this case could be studied within boundaries created by the pandemic. In my study, 25 older adult learners participated in individual interviews and provided their opinions and perceptions about their experiences with the pandemic and its effect on their learning ambitions.

The COVID-19 pandemic has impacted these individuals differently based on their motivations and previous experiences with technology. Four distinct dialogue groups emerged based on the motivations that older adults have to participate in lifelong learning, which are social or instrumental, and also the opinions they have about technology, which are either positive or negative.

The four dialogues are distinct in that they each hold alternate opinions about the two issues raised (motivators and opinions on technology) but there were no major identifiers within the groups that could characteristically distinguish one from another. The results indicate that not all discourses of lifelong learners are reducible to identities or recent experiences. My findings suggest that potential refinement in program delivery based on specific user needs could improve the experiences that older adults have in the virtual classroom, and that it is crucial to the administration of lifelong learning that older adults' unique needs are addressed in a collaborative manner.

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I offer my sincere thanks and recognition to the participants and organization involved in my thesis. I am grateful for the trust of those participating in my research, for it would not have materialized without their respectful understanding and collaborative cooperation. I would also like to thank the faculty and administrators at the University who have made this thesis possible, especially the supervision of Dr. Michel Grignon for his investment of time and energy into the final product. I look forward to creating open-access dissemination of these research results so that lifelong learning communities can improve program development and implementation to better serve older adults fulfilling their lifelong learning ambitions.

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Declaration of Academic Achievement

This thesis research project was developed, managed and executed by me with the assistance of my supervisor who helped edit the writing of the final thesis and assisted in the discussion of how analysis would take place.

The Use of Web-Based Videoconferencing for Lifelong Learners During the Coronavirus Disease Pandemic

Chapter 1: Overview

My experience with education has always been emotionally taxing, for both me and those who provide support to me. I was always anxious in school, like many, and felt that my ability to succeed in our society's structure of school was impeded by my anxiety and unwillingness to embrace challenge. Education was, from my perspective, terrifying. My anxiety would often bring me to a point where I induced physical illness or vomiting so I would be unable to go to school. The nervousness, selfish anxiety, and stomach pains would come and go with tests, projects and school bullies. I never excelled but I never failed terribly in my subjects at school. The insensitivity to my privilege continued as I enrolled and dropped out of various university programs after high school, none of which I found rewarding.

Fortunately, the unravelling and unpacking of my experiences within different employment opportunities led me to pursue an undergraduate university degree in health administration, in health services management. This lent itself well to the jobs I was pursuing in non-profit healthcare and administration. I began to recognize the importance that education would have for me in creating my fulsome life, and how sometimes the things that bring us the greatest fear and anxiety can become our greatest comfort. We retreat to those familiar feelings and can learn to turn those fears into successes.

In January of 2019 I enrolled in a university course called Aging and Technology. I had already finished all of the undergraduate course requirements necessary for my graduation from Ryerson University that Spring, but the thought of a semester going by

without being enrolled in a course or class made me feel just as nervous as *first day of school* nerves. This is when I came to realize that I was, or would become, a lifelong learner. The privilege that I hold in accessing education so readily has given me the confidence to pursue continued education even when it has been one of the aspects of my life that I considered to be my greatest set back.

Following the completion of this Aging and Technology course, which was an online class, the professor, Dr. Elizabeth Kelson, and Sandra Kerr, the director of the LIFE Institute at Ryerson, introduced me to Frank Nicholson who was, what I now consider, a pioneer in the space of online lifelong learning for older adults. He introduced me to the world of Third Aged learning (Third Age Network, 2019), the Societies that host continued education for older adults, and the contexts in which lifelong learning is situated. Frank was running his own cross-Atlantic Zoom discussion groups to help increase other lifelong learners' abilities in using Zoom. He believed that Zoom would be the way of the future for older adult learning and believed it to be an excellent mechanism for connecting facilitators and students from across the pond. Because Frank's epistemology to lifelong learning is grounded in geragogy, where older adults can thrive in their learning experiences when the rapport between the student/learner and the teacher/facilitator is based on social inclusion and sense of community (Formosa, 2012), I believe his methods to be ground-breaking. His operationalization of online lifelong learning for older adults that encompasses these principles of active learning and social inclusion has proven to be just as effective as in-person lifelong learning.

Through the introduction to Frank and his many lifelong learning colleagues, I proposed to explore access issues and barriers to lifelong learning for older adults as my

Master's graduate research within the Health, Aging and Society program at McMaster University; I enrolled in the Fall of 2019 in the program, before COVID-19, with the idea to work on this project. However, due to the COVID-19 pandemic, my attention was directed to how older adults who are currently participating in lifelong learning have been affected by the sudden transition to online facilitation methods.

Therefore, my thesis is structured as follows: in the *Introduction and Rationale* I review the literature on online lifelong learning and justify adopting the interview methods I employed. Following, in the *Methods* section, I outline how I prepared for and conducted my research and discuss rationales for those decisions. Then I present my findings drawing from the data I collected from interviews with older adult learners on their experiences with transitioning to an online model of continued education throughout the COVID-19 pandemic. Finally, I discuss my findings critically with reference to the geragogy model in which my research is fixed.

To conclude this overview, I would like to bring the reader's attention to the definition of lifelong learning as it is used within this thesis. Lifelong learning can mean many different things. As Findsen and Formosa (2011) have stated:

The use of terms such as 'adult education', 'recurrent education', 'adult and community education', 'lifelong learning', 'community development', 'continuing education', 'lifelong education', 'the learning organisation', 'the learning society', and indeed, 'older adult education', have been used loosely in a variety of historical and ideological contexts. (p.21)

These terms may overlap with one another, and their meanings may be different in particular contexts, as the terms are used loosely by a variety of populations.

Throughout this thesis I refer to lifelong learning as the activities pursued by older adults for the purpose of obtaining knowledge and/or socialization in organized institutional or academic settings. The motives for pursuing learning in older age are various and the means to obtain their desired outcomes are also various, however, these older adults are not pursuing for-credit education at formal learning institutions for the purpose of academic advancements. The activities that they pursue are generally in the ultimate pursuit of leisure and overall well-being.

Chapter 2: Introduction and Rationale

The novel SARS-CoV-2 (COVID-19) pandemic has drastically changed social connection as we know it. COVID-19 has had severe impact globally due to its highly infectious nature, as the severe flu-like symptoms can spread rapidly from person to person in people who are pre-symptomatic and asymptomatic (Government of Canada, 2020a). Some people are also at a greater risk of experiencing more severe COVID-19 symptoms or outcomes, which includes older adults over the age of 60, and the risks increase in parallel with increasing age (Government of Canada, 2020b; Montero-Odasso et al., 2020). Public health experts across the globe are trying to contain and reduce the spread of this disease, and their recommendations involve communities isolating and following physical distancing protocols and limiting the number of people in social gatherings (Government of Canada, 2020c). Given their nature, in-person educational institutions were highly impacted. Educators and their systems implemented public health recommendations by moving their learning facilitation from in-person to online, at all levels, from daycares and nursery schools to universities and private educational organizations (Bozkurt & Sharma, 2020). What used to be a hypothetical vision of a purely online future for education is now a reality for many across the world.

Of these groups of learners who have been forced to move online, older adults are an important and often overlooked audience as higher education is an “age-segregated structure” (Monteparte, 2019, p. 139). Lifelong learners are generally categorized as over 65 years old and are in pursuit of continued education. These older adults are predominantly “post-work and post-family” (Findsen & Formosa, 2011, p. 103). Lifelong learners pursue continuing education and learning for many reasons: it may be a part of

their retirement plans; they have an interest in making a career change; they are seeking meaning and reward; or they may wish to remain healthy and productive (i.e. delay cognitive decline and increase autonomy) (Cruce & Hillman, 2012; Maulod & Lu, 2020; Myers, 2019). Academic institutions continue to experience increased enrolment from a diverse group of post-secondary students (Statistics Canada, 2018), and it can be proposed that lifelong learning amongst older adults requires particular attention due to its increase in popularity. For example, one lifelong learning organization, the Third Age Network in Ontario, was established in 2007, and has since grown to represent more than 9000 older adult learners in Southern Ontario (Third Age Network, 2019). The Third Age Network is similar in structure to many other large organizations of senior lifelong learning groups that have begun to grow in participation, such as the *Association Internationale des Universités du Troisième Âge* (AIU3A, 2018), the *University of the Third Age* in the United Kingdom (U3A, 2021), and *Osher Lifelong Learning Institutes* in the United States (The Bernard Osher Foundation, 2005).

Older adults who participate in lifelong learning are also “often excluded from adult learning statistics,” and therefore there is a greater need to understand more about the benefits of later-life learning that directly affect them (Narushima et al., 2018, p. 653). The Dublin City University (n.d.; Montepare, 2019; Pstross et al., 2017) has created 10 principles for Age-Friendly programs and policies as “it is important that colleges and universities and communities are prepared to accommodate their [older adults] learning needs” (Myers, 2019, Further Insights section, para. 9). One of these principles is to increase older adults’ access to online education opportunities (Myers, 2019). This global pandemic has created a fortuitous opportunity for this specific age-friendly principle to be

more rapidly implemented. As will be discussed in this thesis, the COVID-19 pandemic has encouraged an experiment to better understand the motivations that older adults have in pursuing lifelong learning in the first place. The pandemic experience has allowed older adults to try different methods of learning, or has convinced them to withdraw entirely, and we would like to understand what those motivations may be that encouraged older adults to maintain lifelong learning. I intend that these results will help to improve lifelong learning program development and implementation independent of the current in-person meeting restrictions experienced.

As such, the following sections in Chapter 2: “Introduction and Rationale” will prepare the reader in understanding the methods I employed to facilitate my study, the findings and discussion. First I will present the purpose for this thesis’ research investigation followed by the literature review to provide rationale for the research question posed. I will conclude with the guiding theory of this research, geragogy.

Purpose and Research Question

As a result of COVID-19, lifelong learners have had to transition to online learning (Talmage et al., 2020). Despite the quick transition, some older adults have been able to adapt to new online methods (de Maio Nascimento, 2020). As older adults do not typically engage in learning using online methods, best practices for online lifelong learning with older adults have not yet been identified (Hansen et al., 2020). As a result of physical distancing restrictions due to the COVID-19 pandemic, there is a pressing need to identify best practices for how to successfully transition in-person learning to online for lifelong learners, to accommodate their unique learning needs (Cohen & Sabag, 2020). Identifying these best practices will involve assimilating the experiences

from these current lifelong learners that have had to transition to online methods to create the stepping stone in development, implementation and evaluation of better online educational programs for older adults. Therefore, my research aim is to investigate how older adults who pursue lifelong learning in-person experienced their transition to online learning because of COVID-19 in-person meeting restrictions.

The research question emerged from the lack of information around the perspectives of older adults who participate in lifelong learning, and how they have been impacted by new online learning methods. The research question for this thesis can be organized along the PICO design (Population, Intervention, Comparison and Outcomes) (Aslam & Emmanuel, 2010). The population studied in this research is older adults who pursue lifelong learning courses intentionally designed for older, retired individuals. The intervention studied was COVID-19 provincial meeting restrictions on public gatherings forcing lifelong learning programs to move online. The comparison being made is how the experiences with lifelong learning prior to COVID-19 government restrictions differ from the new methods of learning online. The outcome of this question will create information about how older adults have interpreted a move to online learning. This outcome could be used to inform program design and development for lifelong learning for older adults moving forward, with regards to public health restrictions and future changes.

In order to narrow down the research question posed in this thesis, I conducted a review of current literature that supports our understanding of older adults in lifelong learning contexts, how older adults use and manage technology and internet, and how online learning is implemented in general, irrespective of age. A historical background of

these themes are provided, in addition to the methods employed by other studies and how the other studies' research questions and objectives reinforce that of this thesis.

In conducting my literature review, it has become apparent that understanding the experiences of older adult learners who have moved from in-person instruction, or attendance, to online is not yet explored. There is also no existing information about when online instruction for older adult learners will resume in-person, i.e. when older adults will transition back to in-person lifelong learning from online learning, or what hybrid models may exist. Most lifelong learning institutions, with respect for the severity with which COVID-19 affects older people, will likely continue their course instruction and seminars online until the communities they are featured in have received clearance from public health authorities.

Because of my interest in the topic of online learning amongst older adults, primarily through the methods of videoconferencing, I had conducted preliminary research in the literature on the benefits of lifelong learning for this group, pre-pandemic. Therefore I was able to thematically categorize the literature I uncovered in my review into three groups: (1) older adults and lifelong learning, (2) older adults and internet/technology, and (3) online learning and all age groups.

Articles for my literature review were accessed through McMaster University Library's online database and Google Scholar. To begin my search, I looked specifically for journals that publish research on lifelong learning for older adults by searching *lifelong learning* (6 results with one of relevance) and *continuing education* (27 results with 6 of relevance) in McMaster University Library Find e-Journals. Within each of these relevant journals, I manually searched for articles that specifically supported

research around lifelong learning and COVID-19 for which there were only two relevant articles published at the time of my original search.

Search terms used within the McMaster University Library's online database for journal articles were *lifelong learning*, *continuing education*, or *learning* in combination with *older adults* and *pandemic* or *COVID-19*. For example, searching *lifelong learning AND COVID-19* within academic journals in McMaster University's Library produced only 5 articles. It is important that I restate that it proves to be difficult to search for articles specific to older adults within lifelong learning, in the context of my research question, because lifelong learning, as aforementioned, is defined in various ways by different end users. Citation mining to find other journal articles applicable to my topic ended up being a useful tactic to find relevant articles specific to lifelong learning for older adults, and understanding the behavioural and motivational theories that it encompasses.

With respect to the other two themes (2) and (3) that I identified in my literature review, research on older adults and technology and internet usage is vast, as is research on online learning within all age categories. These widely researched topics are also useful to my thesis as there is knowledge from these areas that translates well to my study of lifelong learners' transition to online learning. Therefore, other journals I consulted were gerontology and education focused, which provided me with three more relevant studies to review about gerontechnology, motivations to participate in continued education amongst older adults, and the ideals of geragogy. Consequently, I concluded that the need for my investigation is supported by these diverse articles within the fields of lifelong learning and older adults' social and intellectual well-being, and internet and

technology use amongst them (Bai et al., 2020; de Maio Nascimento, 2020; Talmage et al., 2020).

Review of Current Literature

My review of the literature clearly identified that lifelong learning programs aim to engage older adults in educational activities (Sloane-Seale & Kops, 2008). Older adults are also drawn to lifelong learning because of its ability to reduce isolation and expand social networks (Hansen et al., 2016). Additionally, Hansen et al. (2020) question whether technology-based instruction for lifelong learners would help some adults overcome barriers to participation while still retaining the satisfying levels of social engagement and acquisition of knowledge they hope to attain. Lifelong learning institutes are continuously evolving and most recent technological advancements are making the pursuit of lifelong learning more modern and appealing to adult learners (The National Resource Center for Osher Institutes, 2018). Video and audio enhancements may be used to create a reasonable substitute for in-person classes for older adults, but its efficacy in creating self-fulfillment for its users is questioned.

There may be a perceived resistance from older adults to participate in online learning activities because of the resistance to technology from some older adults (Hansen et al., 2016). Some older adults fear technology use will diminish the benefits of face-to-face interactions (Hansen et al., 2016) despite the evidence that information and communication technologies can reduce social isolation, loneliness and improve social interactions and self-esteem amongst older adults (Agarwal et al., 2009; Chen & Schulz, 2016; Fokkema & Knipscheer, 2007, Wilson, 2018). Some perceive that internet and technology use amongst older people requires higher cognitive abilities (Freese et al.,

2006) or that its use amongst older adults is constrained by exactly what sets older adults apart from younger adults, cognitive and physical resources (Lane et al., 2015). It has also been proven that the digital divide experienced by older adults is closing (Haight et al., 2014), and the adoption of technology is accelerating within this age group (Hansen et al., 2016). However, the perceptions of technology use specifically within virtual learning amongst older adults are unknown in academic research and has justified the need to investigate this with respect to COVID-19's implications on in-person lifelong learning.

History of Subject

Older adult learners are now being represented more often in continuing education but there is still a lack of information about them in research on lifelong learning. There does exist, however, relevant research and information regarding the demographics of older adults who participate in online lifelong learning in the United States (i.e., majority female, white, higher socioeconomic status) (Cruce & Hillman, 2012; Hansen et al., 2020). Hansen et al. (2016) conducted a 14-item survey obtaining over 3000 responses from the Osher Lifelong Learning Institutes in the United States and confirmed that the largest age group of lifelong learners in their organizations was between the age of 65 and 69, and over 70% of respondents to the survey were women. The perceived motivation to participate in lifelong learning has also been studied in Canada (Sloane & Kops, 2008). Motivations to participate identified in Sloane-Seale and Kops' study (2008) were: learning to acquire knowledge, socialization and achieving a goal. But there is no research about older adults' opinions on technology use combined

with research on motivations to participate in this exact context of transitioning from a former in-person model to an online model.

Because of the COVID-19 pandemic, increased pressure has been placed on educators to move their facilitation online. Studies have already proven that this transition due to COVID-19 has taken place (Talmage et al., 2020) and that older adults have largely been able to adapt to online methods (de Maio Nascimento, 2020). Best practices for online lifelong learning have not yet been identified (Hansen et al., 2020), but the COVID-19 pandemic has become the spark that began the process of transitioning in-person learning to online/distance learning (Cohen & Sabag, 2020). Cohen and Sabag (2020) have identified benefits of this transition to online learning (not limited to traditional aged students). These advantages include improved innovations in current methods of delivering distance education, creation of a daily habit to learn and fostering the idea of lifelong learning, increased autonomy for learners, growth in smart technologies, combination learning (including asynchronous and synchronous teaching), increased open access materials developed by universities, and increased government funding and policies for online education (Cohen & Sabag, 2020). The study conducted by Safie et al. on motivations to adopt mobile learning amongst adult learners has suggested that mobile learning needs to be built to increase adoption amongst older adult learners, leaning towards a trend of older adults who are interested in participating in lifelong learning online (2018).

Methods and Methodologies of Other Studies

Little research has been completed to date on the perceptions of older adults' transition from in-person to online learning, even before the COVID-19 pandemic forced

this transition upon educators and students. Therefore my interpretation on how to best conduct the research for this thesis, based on previously researched methods, was limited. From the articles reviewed in the literature, interviews and surveys have been the main methods implemented in research on perceptions of older adults' lifelong learning participation or older adults' internet and technology usage.

de Maio Nascimento's study (2020) on U3A students' access to information throughout the pandemic used phenomenological interviews to speak with older adults about their COVID-19 experiences, which allowed the researcher to reveal responses from participants from their perspectives. A reflexive, thematic approach in analyzing interview data was implemented by Maulod and Lu (2020) in their study on lifelong learning amongst older adults, which I used in conjunction with a biographical analysis to help analyze the narratives within the embedded cases (Field, 2013). As such, the methodologies that I employed in my research were "qualitative and case study approaches" as they are suggested to be helpful "to better understand the in-depth experiences of students and instructors" (Hansen et al., 2020).

In restating the founding question behind my study, I asked how these particular individuals (older adults who participate in lifelong learning) adapted to online learning, because of the social restrictions due to COVID-19. The act of collecting data itself will entail a narrative, qualitative approach, to provide the participant with an opportunity to tell their story from their perspective (Cresswell, 2018). My ability to recount this information will take on a case study approach, to compile the data and provide a detailed description of the setting using more than one participant's story. This case study, qualitative research method is selected because it is often a method selected to study

specific historical events (Baxter & Jack, 2008). Through the review of the literature, I know that the contextual conditions of this study had to be clearly defined, as they are extremely relevant to this situation (i.e. COVID-19 pandemic's effect on older adults participating in lifelong learning).

Support for Objectives from Other Studies

Understanding the experiences of older adult learners who have moved from in-person instruction or attendance to online is not yet explored. There is also no existing information about when online instruction for older adult learners will resume in-person. Hansen et al. (2020) question whether technology-based instruction for lifelong learners would help some adults overcome barriers to participation while still retaining the satisfying levels of social engagement. The need for this study is supported by our need to support older adult learners throughout the pandemic, but the investigation is also supported by our lack of understanding of what is to come when the pandemic is over, and how potential new learning models will affect lifelong learners.

As previously mentioned, The Dublin City University Principles for Age-Friendly Learning demonstrate that college and universities, or other institutions that provide lifelong learning, are going to need to continuously adapt to meet the needs of these unique, older students (Myers, 2019). The need to provide and continuously adapt is also even more crucial than ever before, as today's environments demand of us to be creative when social gatherings are challenged.

As raised in studies with adults of varying ages, learning online through webcams and videoconferencing can raise privacy concerns amongst the students (Kozar, 2016). Kozar's study (2016) also tells us that online/webcam learning requires a higher cognitive

load on the students, but they prefer its use as it reduces the interpersonal distance between them and their teacher in online learning. The author also notes that not all benefits of a tool are used when it is first implemented (Kozar, 2016), so I intended to uncover other benefits identified by interview respondents that may have arisen since the start of their online learning, during the first COVID-19 lockdown.

This proposed investigation would also lead to answers about accessibility and online learning for older adults, and how we can improve upon program delivery in the near future. As Aquino and BuShell (2020) note, setbacks are inevitable for online learners, but it will be important for the facilitators and instructors to be aware of accessibility challenges so that they can help students succeed. When the online learning format is accessible this will increase the student's participation and interest (Aquino & BuShell, 2020, p. 105). We also know that older adults fear that courses offered through universities or colleges (as opposed to a community centre, for example) are geared towards a younger audience of students (Sloane-Seale & Kops, 2007). Online learning for older adults must ensure it is targeted towards older adults, and that Age-Friendly University Principles are clearly identified in promotion. Sloane-Seale and Kops (2007) suggest partnering with community organizations to garner more trust. Xie et al. (2020, p. 467) also note that as we continue to move "information, services and social interactions" online, there will be an increased "need for funding to facilitate these agencies' ability to deliver digital technology to older adults."

COVID-19 has greatly challenged how we think of lifelong learning, and has also impacted the meaning of leisure, and learning through the life course (Field, 2013). To better understand the experiences of older adults as they moved from in-person

instruction to online, we need to appreciate older adults “as differentiated in terms of generational identity and location” (Field, 2013, p. 117). It was crucial to this investigation to speak to these generational experiences of older adults in connection with their perception of learning online. In addition to generational differences, some older adults may identify barriers in learning when they transitioned online. Internal barriers such as age-related setbacks like impaired vision, or external barriers such as limited access to internet or a tablet were identified by Bai et al. (2020).

Similar Research Questions from Other Studies

This study investigates whether older adults are able and willing to integrate videoconferencing or internet-supported learning facilitation since the COVID-19 social gathering restrictions were implemented. We know from previous studies before the disease outbreak that older adults are ready to integrate technology-based interventions into lifelong learning (Hansen et al., 2020), and it helps those individuals who are physically restricted at home to have greater access to positive lifelong learning experiences.

I have personally experienced how quickly the world has shifted to implementing online videoconferencing methods for activities of daily life. I could only imagine that, just like my academic life and employment were quickly transitioned to working from home via Zoom, many of the online programs older adults participate in now were affected greatly by the haste in which they needed to be implemented (Tang et al., 2020). As Cohen and Sabag (2020) mention, educational programs underestimated the importance of online programming prior to COVID-19. Little research was completed prior to COVID-19 around the implementation of online learning for older adults,

therefore this hastened transition will have led to more inequalities in access to education (Cohen & Sabag, 2020). This mirrors previous research on the demonstrated inequitable distribution in demographics of older adults participating in organized lifelong learning programs (Hansen et al., 2019). My investigation also recognized how the learner's background and, as previously mentioned, generational differences, will empower or enhance the experiences of learning online (Maulod & Lu, 2020).

I hypothesized that from my research outcomes, suggestions for future program development and implementation will come from understanding motivations, backgrounds of learners and identifying areas for improvement. Understanding the older adult's willingness to transition online will be important to create a successful online experience (Maulod & Lu, 2020). Learners will likely be required to have higher literacy capacity skills to understand text-based informational content online. This would mean the older adult needs a high cognitive ability to use internet (Freese et al., 2006). Airola et al. (2020) noted frustration was identified with using videotechnology amongst older adults, and I hypothesized that older adults in this investigation will recommend that programs be kept as simple as possible. Xie et al. (2020) recommend that greater financial and time investments into creating these programs will be the biggest challenge. I anticipated that my study would likely demonstrate similar opinions from the lifelong learners I would interview. A hybrid solution may also be the most helpful way to transition older adults into an online lifelong learning format as they become acclimated to these major changes (Xie et al., 2020).

Results from Other Studies

My literature review identified research results that demonstrated digital technology adoption amongst seniors has been increasing (Talmage et al., 2020). Many older adults identified that they do not have access to technologies or cannot operate devices, but they recognize technology's importance in sharing information (de Maio Nascimento, 2020; Wang et al, 2011). The pandemic has severely altered perceptions of physical and mental health for lifelong learning students (de Maio Nascimento, 2020, p. 509), and this may be as a result of the large amounts of information shared online as a result of COVID-19.

None of the research I reviewed specifically outlined motivations to participate in lifelong learning as a research result. This is important for me to explore in the context of why a lifelong learner would continue pursuing lifelong learning despite the COVID-19 restrictions.

Other outcomes and recommendations from the limited studies explored to date suggest that older adults should be involved in the product development of online courses (Bai et al., 2020), for example, more active learning models versus passive. This pandemic has also informed us that we need to continually have updated virtual information sharing processes and improved virtual social interactions (Pepper & Burton, 2020). By involving older adults in the process, it can help to bridge a gap and get older adults' feedback in testing and developing new online tools that will end up being used by their cohort. It is also important to note that this involvement of older adults in product development can be better supported with the investments of governments in playing a larger financial role in financing older adult educational programs. Governments should play a role in continuing to support older adults in their endeavours online and their use

of technology for continued learning (Bai et al., 2020). Interestingly, the interview respondents never brought up this concept.

The results of other studies I reviewed also suggest that research should ensure that results from subsequent studies be useful to lifelong learning organizations. It will be important for the derived data to be generalizable to other geographies as this COVID-19 disease outbreak is a global issue (Bai et al., 2020).

Theories

It is recognized that older adults can continue to participate in new activities and learn new skills (Ungvarsky, 2019) despite prejudiced beliefs about retirement and declines in physical and mental abilities as people age. Lifelong learning promotes later life as a time of increased competency and knowledge (Narushima et al., 2018), which can be achieved through online environments where diverse groups of older adults can collaborate. Technologically enhanced learning environments have great potential to equitably diffuse knowledge as it allows all participants to engage, share resources and be active in this channel of social involvement (Altinay et al., 2016). New tools integrated into an older adult's educational experience can also create new types of knowledge transfer to support the learning experience (Nagy & Bernschütz, 2016). Understanding the collective opinions and perceptions of lifelong learners participating in online programs within this global pandemic phenomenon will enhance the future delivery of these programs for older adults.

Based on this understanding of capacities and benefits of lifelong learning for older adults, this study was shaped by the current perceptions around lifelong learning, one of which is the geragogical model (Schoen, 2018). Learning for older adults has

warranted its own learning methodology (Formosa, 2012), which considers the different physical, cognitive, and emotional needs of older adults compared to younger, traditional-aged students. This model represents partnerships between the student's drive to meet goals and needs, which is supported by the teacher, as opposed to the more frequently used teacher-directed learning (Schoen, 2018). The practices and frameworks that embody geragogy highlight "learning as a collective and negotiated enterprise amongst older adults" (Formosa, 2012, p. 41). This partnership model also guided my participant-researcher conversations whereby the participant uncovers their perceptions and intentions within their personal pursuit of lifelong learning and, as researcher, I describe these perceptions and intentions to a wider audience. Through this partnership, both parties will achieve learning goals. However, I recognize that the theory of geragogy itself is still growing and the "practical application of learning principles" specific to older adults' needs (Dorin, 2007, p. 113) are still not fully understood.

From a theoretical perspective, when we consider the practice of geragogy, I am looking to support the identification of lifelong learning for older adults warranting a separate educational practice. The COVID-19 pandemic has certainly created a new scenario in which older adults may participate in lifelong learning. The diversity amongst these older adult lifelong learners is broad and not only do we need to ensure we do not overlook the "experience of situational circumstances" (Findsen & Formosa, 2011, p. 105) of older adults being different to those of younger learners, the varied experiences within the cohort of older adults learners themselves are infinite. Therefore the dialogues I unpack within the "Findings" and "Discussion" chapters of this thesis help us understand how the experiences differed based on the different dialogue groups'

technological and learning motivation factors. Geragogy is used to sensitize “the unique characteristics of older adult learners and tailor their instructional plans accordingly” (Findsen & Formosa, 2011, p. 103). I believe that the theory of geragogy can further sensitize the gerontological issues in lifelong learning by demonstrating the diversity amongst this group of learners and consider the “heterogeneous character of later life” (Findsen & Formosa, 2011, p. 105). Like Findsen and Formosa (2011), I too propose that this increased awareness can improve facilitation, planning and execution of efficient learning experiences for older adults.

Chapter 3: Methods

Before I begin to explore the findings from my research question, I provide an overview of my methods section. I have positioned my research within a narrative and case study methodology. Decisions made for the design of my study and the methods utilized were framed around the context of the case study. The research was bound by this case so that I could explore a specific problem and setting: the context of pandemic lifelong learning amongst older adult learners. I detail in this chapter the specifics of the population and sample of my case study, and the methods I undertook to recruit participants and execute interviews with respondents.

Methodologies

I built my study design for this thesis project on the fundamentals of narrative research but primarily within case study research principles. Narrative research is best suited for telling stories of individual experiences using interviews (Cresswell, 2018). Narrative stories, retold by the lifelong learners, come from their own personal experiences and perspectives (Reissman, 1993). Naturally, the narrative recounts are rhetorical, interpretive and are “creatively authored” (Reissman, 1993, p. 5). My interpreting of these recounts will be “inevitable because narratives are representations” (Reissman, 1993, p. 2). The narratives that the learners shared with me are representations of their experiences over the past 20 months of restricted in-person learning. This is particularly important in helping respond to the research aim of this thesis because we need to understand how the participants individually interpreted their experiences with the restricted in-person learning opportunities. I attempted to conduct the interviews with my participants with good intentions by removing my bias from

interpreting the ideas that they would present to me. This proved to be difficult based on the background investigation I conducted about motives amongst older adult lifelong learners, and preconceived notions I hold about older adults' understanding of internet and limited technology usage.

Despite the importance of narrative methodologies informing my research scope, I primarily ground my research design within case study research as it is to be used to provide an in-depth description and analysis of multiple cases, studying an event (Cresswell, 2018). In my research, the case study approach allows me “to better understand the in-depth experiences of students” (Hansen et al., 2020, p. 348). Case study qualitative research is a method used to study specific historical events (Baxter & Jack 2008) and, in this project, many lifelong learners were interviewed to help better understand the circumstances of an event, COVID-19 affecting their learning process. This will help us develop an understanding about the impacts of COVID-19 on older adult learners, and interventions that were meant to improve or sustain their participation. In addition, case study methodologies do not confine the researcher to a limited number of questions as in a controlled study (Range, 2019). As was seen in many of the interview discussions, participants discussed a variety of topics and areas of their lives that were affected by COVID-19, and as a researcher, I tried to be open to learning from the individuals that were being interviewed. My receptiveness to the variety of discussion points that respondents brought up also provides an interesting window of observation into geragogy. The experiences described by the respondents and the opinions they shared about lifelong learning, in general, can provide insight into geragogical models that will better serve older adults in learning activities.

From the articles reviewed in preparation for this thesis, interviews and surveys have been the methods implemented in research on perceptions of older adults studying or communicating online. The data collection through interview conversations took on a narrative, qualitative approach, to provide the participant with an opportunity to tell their story from their perspective (Cresswell, 2018). The ability to then recount this information will take on a case study approach, to compile the data and provide a detailed description of the setting using more than one participant's story. In my literature review, I also noted that phenomenological interviews have been used in previous studies (see de Maio Nascimento, 2020) to speak with older adults about their COVID-19 experiences. Interviews are typical methods used within case study methodologies and because COVID-19 situates itself within a phenomenon experienced by these older adult learners, it is a suitable method for this research.

Additionally, contextual conditions of this study need to be clearly defined, as they are extremely relevant to the participants' situation (i.e., COVID-19 pandemic's effect on older adults participating in lifelong learning). Recounting the events that took place over the past year will be significant for historical recordings of how lifelong learning was affected by a global pandemic. In addition to the contextual conditions of this study being bound by time and circumstance with COVID-19, it was important to me, as investigator, to continuously recognize the demographic difference between me and the participant, to actively remove bias or influence. Although I myself became a displaced graduate student as a result of COVID-19 restriction on in-person learning, I did not recognize myself to be a part of this case of older adults. The case study I researched is bound more specifically than just the context of the pandemic and meeting

restrictions, but also by age, learning ambitions and motivations, and previous learning experiences.

Population and Sample

As mentioned, the population of interest is that of adults over the age of 50 who are pursuing, have pursued or are interested in/considering pursuing lifelong learning. For pragmatic reasons, the latter category (interested in, but not participating) could not be studied in the present work. Those individuals who are interested in lifelong learning but are not currently participating in it could not be sampled from the population for this study as recruitment information was sent out to lifelong learning organizations that have or had existing members. Recruitment for individuals who are not associated with lifelong learning organizations would have required a more expansive recruitment process to cast a wider net amongst older adults who enjoy or would enjoy lifelong learning.

The population of interest is heterogeneous in its relationship to online learning, and therefore from the perspective of the geragogical lifelong learning theory we wish to contribute to (Range, 2019), it can be said to be comprised of three subpopulations of interest, each of which needs to be sampled separately (to make sure it is represented in the final sample of respondents). These three subpopulations are presented in Table 1.

Table 1***Groups of lifelong learners***

Transitioner	Dropout	New
Traditional in-person lifelong learners moved to an online format due to pandemic physical distancing measures and facility closures.	Traditional in-person lifelong learners dropped out of/discontinued participation in lifelong learning because the option of moving online was not acceptable.	Older adults who may have never participated in lifelong learning. These individuals may live in remote areas or have mobility issues, and took advantage of the new settings for learning online due to COVID-19.

As will be described below in the Recruitment subsection, I did not have access to separate frames or population listings for each of the three groups of lifelong learners. I had to rely on one source and their willingness to respond to populate my sample. Ideally, I wanted to interview the same number of respondents in each subpopulation. A tentative number of 10 respondents per subpopulation was the initial objective, yielding a potential total sample of 30. Thirty is the upper-limit of the number of open-ended interviews that could be conducted in a time-limited, one researcher project, and 10 per subpopulation seemed to be a reasonable number to capture a variety of situations and opinions within each subpopulation, and potentially saturate the universe of discourses on online lifelong learning. Similar research (de Maio Nascimento, 2020; Bai et al., 2020) use similar sample sizes.

Including a sample size of 10 participants within each category provides enough context around the experiences of these three groups and how they differ from one another. The differences amongst the three groups can inform the development and improvement of new and existing lifelong learning programs for older adults that will be hosted online. Participants were identified to their category (Transitioner, Dropout or

New) as the interview was being conducted and responses to some of the interview questions were obtained. As it turned out, there was much more response from participants willing to be interviewed from the Transitioner (n=19) category than from the New (n=4) or Dropout (n=2) categories.

Recruitment

I recruited participants via the assistance of administrators at lifelong learning organizations, or participants who helped snowball participation to acquaintances. Following ethics approval, email requests were sent to various lifelong learning channels such as the Hamilton Third Age Learning organization, Ryerson University's the LIFE Institute, the University of Toronto's Academy for Lifelong Learning, the Society for Learning in Retirement in London, the Calgary Association of Lifelong Learners, and other unofficial lifelong learning study and course groups. A request was made to each organization administrator to send out an Email Recruitment script sent on behalf of the researcher (and reminder) (see Appendix A) in addition to the Letter of Information / Consent (see Appendix B). These organizations were selected because of my connection to some lifelong learners who were associated with these programs or who were willing to extend a request for recruitment to the administrators. These organizations run education programs geared towards older adults who are retired and interested in active or passive learning. The members of these organizations likely would have transitioned from their traditional in-person facilitation to online learning because of the COVID-19 meeting restrictions. The organizations would have also had members who did not transition to online learning, and new members to the association, which is how all three subpopulations of lifelong learners could have been attained for this analysis.

The inclusion criteria for participant recruitment (mentioned within the invitation email) were as follows:

- Is 50 years old or older
- Is pursuing/has pursued continuing education/lifelong learning
- Has access to internet and device (i.e. laptop, smartphone or tablet). Participants without access to internet and device may be allowed to participate using alternate interview methods, i.e. phone.
- Speaks English, i.e. is able to sustain a conversation in English

Additionally, more participants were recruited through snowballing; recruited participants were granted permission to pass on the study information to fellow classmates or friends they believed would be interested in participating in this project by use of the Snowball Email recruitment script (see Appendix C) and attached the Letter of Information / Consent (see Appendix B). As is common in this sort of research (Bai et al., 2020, p. 295), there may be limitations in attracting participants to respond to this research recruitment request, which is why I utilized the snowballing technique to recruit more participants through references from other participants. Anticipating that many of the recruitment emails to organization members would go unanswered, whenever a participant met with me for a virtual interview, and suggested a friend or fellow lifelong learner who would be a good fit for this research, I provided them with the necessary information that could be forwarded to the new potential participant via email. This way, potential participants who were introduced to this research from a friend could decide whether they would like to contact me to schedule an interview or reject the proposal. In the instances throughout the recruitment period where direct contact information of

potential participants was provided, the email recruitment script (and reminder) were sent directly to participants (see Appendix D). Although snowballing techniques may be perceived as convenience sampling and limiting diversity, it did not affect the quality of my findings, as I explain now: As will be explored in Chapter 4 “Findings”, the demographics and characteristics (things that could not be changed about the participants) were not determining in creating the discourse groups that I uncovered. Therefore, if a participant snowballed recruitment to potential new participants, whatever characteristics they may have potentially shared did not affect the grouping of discourses.

Incentives

No monetary or in-kind incentives or compensations were provided to interviewees for their participation. Some possible benefits that the interviewees may have experienced are as follows: The interview process may have informed the participant of some of his or her own learning goals or ambitions within lifelong learning. The interview may have given them a chance to explore their opinions on why they pursue lifelong learning and why they believe it benefits them in their successful and healthy aging journey. Additionally, the implications of this research is that the results may be used to inform the development of new lifelong learning programs for older adults, in addition to evaluating and improving existing lifelong learning organizational structures.

Data Collection

Data regarding participant experiences with lifelong learning, their decision-making and past preferences regarding learning were collected through one-on-one live,

virtual interviews. This was imperative in executing a qualitative, case study approach to this research.

Data collection began when participants responded to the recruitment email indicating their interest in participating in an interview. I recorded their email and name for administrative purposes because, for example, I had the ability to contact them in case an interview needed to be cancelled or they did not attend the scheduled Zoom meeting. I also had on record the name and email address for those participants who wanted to receive a summary of the final dissemination of the project results. This data was held in a secure, password-protected spreadsheet saved to a password-protected computer. No one other than me had access to any of the emails or documents regarding this project. Emails from participants were saved in a separate folder in my email inbox, and had been deleted once confirmation of an interview date had been confirmed. Contact information was not included within the transcripts of individual interviews, meaning there was no link between the interview and a participant's information.

Interviews were scheduled with the participant via email and a Zoom video call was used to conduct the interview. The Zoom video call allowed the interview to be conducted in real time, in a simulated face-to-face manner so that participant data could be collected to answer the interview questions (see Interview Guide, Appendix E).

Only I interacted, corresponded with and conducted the interviews with each participant. The recording capacity of the interview (i.e. when audio and video recording was turned on and off) was in my control. Consent and approval to record was obtained from the participant prior to any recording taking place. Using the transcription function on Zoom, the interview responses were transcribed and saved from the Zoom platform

following the interview. Participants were informed of the transcription requirements within the emails and the Letter of Information / Consent, and consent to capture this information was acquired prior to the start of recording. The participant's name was never said aloud during the interview, therefore this would not appear in the transcript. Following the session, I downloaded the transcript as soon as it became available and audited the text to ensure that no identifying information was in the document.

Limitations

With respect to this description of the methods I employed for my research, I will bring the reader's attention to identified limitations or challenges that I experienced. I used the best methods possible given the data I collected and any potential limitations are preferable to not executing the research at all. I outline here two challenges I observed in my study.

I attempted to collect quantitative demographic data from some of the lifelong learning organizations mentioned above, however was unsuccessful. To control for the turnover of lifelong learning participants who register and enrol in programming, I wanted to conduct a comparison of the number of students registered the year the research was conducted to the numbers from the previous year. I wanted to create a data sharing agreement with all of the organizations that were willing to reciprocate. These organizations would have provided me with the number of participants who were registered in their organization in 2021 versus in 2019. I emailed the administrators or leads of some of these organizations (for example, the Hamilton Third Age Learning, Thornhill Lifelong Learning, and the Academy for Lifelong Learning - Toronto) but had to correspond back and forth with them to explain the reasoning for the data I was

seeking. They were unable to provide this information to me at the time, perhaps because of the administrative burden it would cause, and I did not proceed to explore this avenue any longer.

Also, I aimed to recognize that older adults may hold internal stigmas about participating in activities online (Airola et al., 2020), particularly if the programs are offered at formal educational institutions or are labelled as programs specifically for older adults. I wanted to demonstrate to the respondents and interviewees that their participation was beneficial to their well-being and that of their classmates and instructors. I made this clear to potential participants in the recruitment materials by outlining participation benefits. However, some internal stigmas that may be experienced by an older adult are resistance to change, their belief that they are unable to learn something new, or that they do not have access to online learning (Airola et al., 2020). Although some barriers to participating and barriers to access do still exist (Talmage et al., 2020), technology can be easily used to mitigate the barriers that older adults have identified with accessing lifelong learning classes (from time constraints to mobility issues). Throughout my literature review, I also realized that my study may not reach those older adults who were unable to continue lifelong learning due to inaccessibility of online formats. This study was limited to mostly recruiting individuals who were successful in moving from an in-person class to an online delivery, or those individuals who were new to lifelong learning online. This was in fact recognized when I recruited participants, as the majority of respondents (23 of 25) were Transitioners or New, and not Dropouts.

Description of Interview Process

The Interview Guide created for this research (Appendix E) demonstrates how the interviews were conducted. Each interview began with a brief introduction and declaration of the interviewee's rights to confidentiality, use of recording technology, and review and collection of informed consent. An Oral Consent Script (Appendix F) was also utilized to ensure that all questions pertaining to consent were asked and to ensure that participants provided consent to continue answering the questions outlined in the Interview Guide. Consent was recorded in an oral consent log that was accessible only by me (see Appendix G). The interview began with warm-up questions to get to know the participant more and to make them feel comfortable (Bai et al., 2020, p. 296), some general demographic questions, and then continued with key questions such as, 'What do you think of education for older adults?', 'Please describe your experiences in taking online courses.', 'What are some of the challenges you have encountered in your learning process as a result of COVID-19?'. Using closed questions probed user respondent experience in addition to open-ended questions (Scott et al., 2009) to uncover imperceptible responses. Terminology clarifications, explanations and segue in conversation topics were supported. It is important to note however, that in following a case study methodology, the conversations were bound to the case of lifelong learning and the consequences of the pandemic.

In the recruitment emails, participants were informed that the interview would be approximately 30 - 45 minutes long, therefore data collection and the recording of the interview question responses would take place during the majority of that time (see Appendix E for Interview Guide). The range of recording length of interviews was between 13 minutes and 37 seconds and 41 minutes and 40 seconds, with a mean of 28

minutes and 21 seconds. The median recording length of the interview was 27 minutes and 17 seconds.

Choice of Interview Questions

I chose the interview questions within the Interview Guide (see Appendix E) because it would help respond to my research aim to investigate how older adults, who pursue lifelong learning in-person, interpret their transition to online learning because of COVID-19 in-person meeting restrictions. We know older adults are motivated and drawn to lifelong learning because of its ability to reduce isolation and expand social networks (Hansen et al., 2016). We also know that there is evidence that information and communication technologies can reduce social isolation, loneliness and improve social interactions amongst older adults (Agarwal et al., 2009; Chen & Schulz, 2016; Fokkema & Knipscheer, 2007). Despite this evidence, older adults still fear that technology use will diminish the benefits of face-to-face interactions (Hansen et al., 2016) regardless of the fact that the digital divide experienced amongst them is closing (Haight et al., 2014). Therefore, in my Interview Guide (Appendix E) I asked participants questions about their experiences with lifelong learning to date which includes their motivation to participate, their experiences with technology, and of course, the implications that the pandemic has had on their participation. Having a conversation with the respondents about their experiences, and most importantly, their motivations to participate in lifelong learning as an older adult, was important because this has impacted the older adults' decision to continue pursuing lifelong learning and their opinions on the way the learning is facilitated. This conversation around the motivations in turn helped me respond to my

research question of how older adults have interpreted the COVID-19 pandemic restrictions on their participation in lifelong learning.

Analysis

All qualitative data collected through interviews was de-identified and then coded. The data was, as described above, first transcribed via the Zoom videoconferencing platform and then reviewed by me. I ensured there were no major inaccuracies or contextual issues with the transcription by referencing them with the audio-video recording. A copy of this summarized data and/or the full transcription was provided to the participants who requested it, so that they could perform respondent validation on their interview responses. So as not to burden the participants, respondent validation was not mandatory. Providing the option to respondents to review their transcripts was done so that the respondent could feel in control of their participation by providing additional input in how their responses would be interpreted in the research, and also so they could be secure in the privacy and confidentiality of their responses. Allowing respondents the opportunity to review the transcripts and edit or remove corrections also aided me in ensuring all identifying information was removed from the transcript prior to analysis. Four of the 25 respondents asked to participate in respondent validation. Only one of the four asked to have one response to a question removed from their record due to programming and administrative concerns with the lifelong learning organization they hold membership with. The remaining three respondents did not provide any feedback as they were satisfied with the transcription and had no additional comments to add. Although the respondent validation was not utilized in a way that would dramatically improve or change the transcriptions for analysis, the opportunity to

allow for this amongst participants is a practice I would continue to ensure trust and veracity is maintained between participants and myself.

All of these transcripts were then uploaded in NVivo computer software for qualitative analysis to find thematic inferences. I followed similar reflexive, thematic approaches in analyzing primary interview data, as was implemented by Maulod and Lu (2020), in conjunction with a characteristic analysis, to help analyze the narratives within the individual case studies (Field, 2013). I also informed my process with a similar method as de Maio Nascimento (2020) and Bai et al. (2020) to analyze the content:

1. Organized the transcriptions.
2. Codification of results.
3. Categorization of results.
4. Using results to infer interpretations of lifelong learning in online formats.

Using a line-by-line open-coding of the transcripts in NVivo, I was able to break down and reduce the data thematically. I created a case classification table to demonstrate the characteristics of each participant, i.e., age, gender, marital status, lifelong learning status, and quarantine activity. I grouped similar interview questions together and they fell under a code as subcodes, where each individual interview question became its own subcode. The subcodes that fell under the top-tier codes were narrowed down to four: barriers to access, opinions on education, opinions on education for older adults, and opinions on technology. Through revisions of the interview responses within each interview question subcode, there was generally one or two options in which a participant would fall. For example, when I asked participants what their opinion was of education, I inferred that their responses would fall into an *increases capabilities* option, or an

increases understanding option. This two option categorization became apparent and emerged from the data and was not understood by me at the time of the interview. It was only understood by me at the time when all interviews were completed and all transcripts were uploaded to NVivo for analysis. I used frequencies (numbers) to demonstrate how strong a response was to an option within the code. The number reflects how many times it was mentioned by the participants. Following this example of opinion on education, the *increases capabilities* option was counted 21 times, and the *increases understanding* option was counted 17 times.

Based on the frequencies in top-tier codes, discourses, referenced as dialogue groups in Chapters 4 and 5, were identified by two dimensions within two of the most impactful codes: motivations to participate in lifelong learning and opinions on technology. As will be further explained in Chapter 4 “Findings”, the distinct four discourses were established by one of the two dimensions that a participant could fall within, and then how that group was further characterized by the second code’s two dimensions.

This case study did not hypothesize any predicted patterns and the research question of how older adults have interpreted their transition to online learning is in fact an open-ended research question. The purpose of my case study is to build an explanation of older adult’s interpretations and explain differing opinions. These interpretations are not known therefore I use an explanation-building technique (Yin, 2012) to detail additional evidence from the open-ended interview questions which illustrate the categorization of these four dialogues.

Ethical Considerations

There are several ethical considerations within my research. I acknowledge this in considering the climate in which I was performing the interviews for my research. The COVID-19 pandemic has created unusual circumstances for individuals who have been removed from their habitual behaviours. Information regarding the process I undertook to obtain informed consent from my participants is found in Appendix H, in addition to the privacy and confidentiality process to which I remained resolute. I also took into consideration the confidentiality of participants, made them aware of the incentive to participate, the safety and risks associated with their participation and their rights to withdraw from the project, which are all found in Appendix H as well.

I also wanted to ensure that I had a greater understanding of my participants before I began my interviews. For example, in collaborating with these older adults, I wanted to ensure that I was more informed of their circumstances and consider the dynamics in which they exist. My professional work experience with the Alzheimer Society of Canada provided me with many opportunities to collaborate intergenerationally with older adults. My experience working with the Society taught me to assist in preparing participants and volunteers from a person-centred approach. I developed a Zoom guide (see Appendix I) that could be provided to my participants if one of them had not used the video conferencing platform before. I also assured participants that I was available to assist with any technical questions or preparations prior to and after the interviews. None of the respondents required additional technical assistance.

Lastly, to supplement any potential concerns from participants who may have been struggling with the afflictions of the pandemic, and wanted more support, an

individualized list of resources could be prepared, based on their geography (see Appendix J). This resource list did not need to be utilized.

Chapter 4: Findings

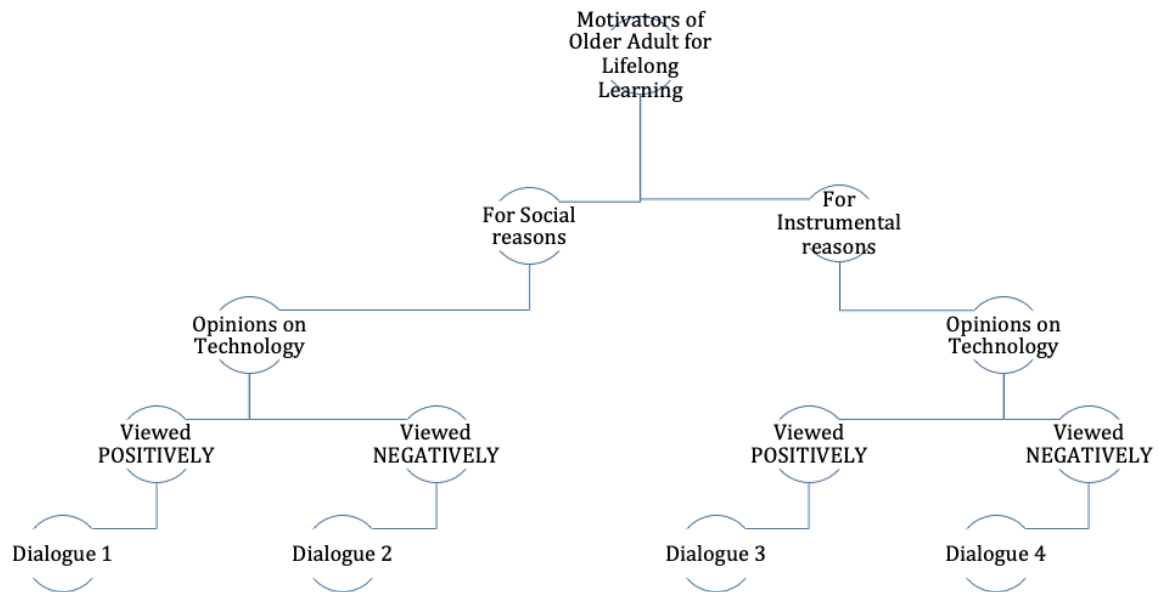
In this section, I present the key findings that emerged from the qualitative analysis of interviews performed to answer the research question. I am interested in understanding and interpreting perceptions, beliefs and opinions regarding the use of technology in lifelong learning. I used the responses from questions on opinions (where respondents were asked to state their perceptions, beliefs and opinions) to structure the discourses (dialogues) and then used responses on questions relative to characteristics (age, marital status, participation in lifelong learning prior to the pandemic, etc.), as well as the description of their experience during the pandemic, and the move to online learning, to illustrate these discourses (who says what). In the interview guide, which I followed very closely (see Appendix D), three main areas of perceptions/beliefs/opinions were covered: technology, motivations and benefits of lifelong learning, and education in general. This could have naturally led to looking for a maximum of eight discourses (two polar positions on each of the three dimensions) and checking that each of these eight discourses were actually populated by at least one respondent. However, it appeared that opinions on education were closely tied to their motivation to participate in lifelong learning. Therefore, I used two dimensions only (opinions on technology and motivations for lifelong learning) to build four discourses and check who voices what discourse.

As demonstrated in Figure 1 below, the four distinct dialogues emerged from dissecting the categories of both the motivations to participate in lifelong learning and opinions on technology dimensions. It is important to note the discourses are not linked or determined. Each dialogue represents opinions on different matters of the same topics therefore the respondents who populate the discourses are not alike. Understanding

multiple dialogues of interpretation helps us to respond to my research question: How have older adults, who pursue lifelong learning in-person, interpreted their transition to online learning because of COVID-19 in-person meeting restrictions?

Figure 1

Categorization of Interview Discourses



With the classification of these four dialogues, I will now discuss each group's characteristics and the evidence that is demonstrated in each group's unique opinions on the motivation to pursue lifelong learning and their opinions on technology.

Dialogue 1

Dialogue 1 consisted of 6 respondents from the 25-person sample: 1 Dropout, 2 New and 3 Transitioners. These individuals are between the ages of 60-80 and 5 are female. The group was evenly split at 50% believing the pandemic has restricted their

participation in lifelong learning, whereas the remaining believe it has not. All of the individuals in Dialogue 1 shared the experience of participating in online or virtual learning for the first time as a result of the pandemic. Five of the six individuals in Dialogue 1 generally pursued more social activities and activities for enjoyment, versus the one individual who spent most of their time pursuing self-improvement activities during the quarantine and self-isolation periods of the pandemic. This group can be described as more social learners, who participate in lifelong learning for the fun and enjoyment of it. Dialogue 1 respondents were also generally more open to the use of technology in pursuing lifelong learning through the pandemic, and with some practice they were able to master its use in facilitating their continued education activities creating a positive experience. Most importantly, their opinions on education that is specifically geared towards older adults is that the pursuit of lifelong learning is about the topic of interest and less so the age category. There are, however, particularities in older adult education that must be attended to so that their participation is accessible.

Motives

Some respondents shared what they personally found to be a motivating factor in their participation, and also what they believed to be shared motives amongst their peers. The respondents in Dialogue 1 cited a few reasons for their motivations but generally the themes of social and interpersonal connections, as well as community building, were described. For example, TF66 said that older adults are motivated to participate in lifelong learning because it is a way “to meet new people, make new contacts and to be social, as well. [Benefits of lifelong learning are] Social and to learn new things and to be part of a community. The being part of a community I think is important, like for

friendships when you're learning together as a group.” TM79 said “there's also, and I feel strongly about this, there's a social aspect to it as well. Getting to meet people you wouldn't normally meet. It'd be so easy to sit on your couch or stay at home, but there's a real, major social aspect to ongoing education.”

As the conversations progressed, more information was shared about the social aspect of lifelong learning for older adults, particularly about experiences with learning throughout the pandemic:

Just the opportunity to sit and talk about something you really enjoy. Lots of us had been to art galleries, or if you've been to Europe, and so this was a way of sharing our experiences, but also focusing on just one aspect that we present to the group and learning from others. Hearing what others are interested in was so enjoyable and it was a lovely group to sit in and the jokes and camaraderie. It was a small group, like 15 people. I think it's that social aspect of it beyond the stretching yourself and trying to find yourself with that stimulation. It's the social part that is important. (NF72)

I would say it was overall really good, because you get to socialize because technology made it this way. You feel a lot of gratitude towards Zoom and just life in general to see your friends and everybody if you can't hook up. We have Zoom parties. (TF66)

Put simply, NF72 and NF73-2 said that a benefit of lifelong learning “is the communicating with other people” and “Companionship”, respectively. As a new participant to lifelong learning, NF73-2 stated that “it [lifelong learning] has been very

helpful because, being cooped up at home as much as we have been, it's a way to reach out and connect with other people.”

Some respondents in this dialogue also stated that lifelong learning was important for improving their social skills and intercommunication because “Like I said before, it helps me to participate in life with other people because I've learned something that I can talk about...it can help you to understand and converse with a lot of people and maybe your children or your grandchildren, keeps you in the loop” (DF65). Similarly, respondent NF72 stated that participating in lifelong learning presented the opportunity to communicate with others from diverse backgrounds: “And I loved it because you had so many different experiences coming into it, you weren't all the same...When they're [lifelong learning programs] online, it doesn't matter where you are. There's a realization that it's opened up for interaction with people from other areas.” Respondent NF73-2 mentioned that she chose to participate in a lifelong learning program because she wanted to meet new people “we only just moved to [the city] and I really don't know anybody, and unfortunately between my hip operations and the pandemic, I haven't really gotten to know very many people.” Another respondent took matters into their own hands at the onset of the pandemic to ensure their social requirements were met in lifelong learning, “As an offshoot from Spanish [lessons], I met two women and we decided on our own to meet once a week to speak only in Spanish, and now we're doing it on Zoom” (TF64).

Although a motivator to participating in lifelong learning is about making connections, NF73-2, like many other respondents, mentioned that the pandemic and meeting restrictions have created barriers: “Yeah, I met new people but I'm not able to connect the way you would, if you met them in-person where you can have a coffee

afterwards, or you find someone you have a lot in common with. It's more impersonal, not quite as satisfying...I'd prefer to be in-person." This social component of lifelong learning is important to this Dialogue 1 group but it hasn't been without its challenges. "You want to get together and hug your friends" (NF72).

The online facilitation also restricted the social interactions: "Because the teacher had to tell you when you could say something and then they would cut you off and go to the next person. It wasn't really like a warm, open environment" (DF65). But conversely, some respondents thought the structure to the interpersonal component of lifelong learning was an improvement to what the learning setting was like in-person: "We're more disciplined then when we were in-person. I'm not missing the side conversations. It can be very annoying, as a moderator. It's been difficult to step in and stop that. People talking while someone is making a presentation. I think that's been a positive. It's the respect between individuals, allowing people to speak, making good comments and no personal conflicts. It's a benefit" (TM79).

Opinions on Technology

The Dialogue 1 group described their opinions on technology to me candidly in response to the question that came at the opening of the interview guide. As gathered from their responses, Dialogue 1 had never used an online or virtual format for lifelong learning, but they generally conceded that the process was easy enough to understand and grasp, eventually, and was not a barrier. TM79 said:

Personally, I had to learn about Zoom and all the ins and outs. Frequently, I do some research as to what was going on, write instructions. We had three or four people writing instructions that we put on our website for our members. That was

a learning process for me. For our members, and we have about 150 people participating in Zoom meetings, some of them were already using Zoom with family and friends. There were some who'd never used it before in their life, and so that was a learning process for many of our members. And it was a learning process for me in coaching people and then scratching my head about this particular problem and then having to solve that, so my mind has been buzzing.

Many respondents in this dialogue spoke about how easy it was to participate online for their lifelong learning activities. In the words of 3 respondents:

I'm not very good at technology. It's frustrating but I love it just the same. I use my iPad. The teacher had a Zoom link. It worked out perfectly. I was able to see all the other class members. It was easy. (TF66)

It wasn't really a challenge, it was just to be able to learn how to use Zoom which is actually very easy. It's funny because a year ago I didn't know what Zoom was. One day I got three Zoom invitations and I had to ask my kids 'What the hell is Zoom?' (TF64)

I think that was it really; figuring out the Zoom or whatever we used was no problem after the first week I had that, I understood that, that was okay. (DF65)

Respondent NF73-2 took a self-led online course and said, "It was really a well laid out course". She continued to explain, "Actually, I found it incredibly easy. I was quite surprised at how easy it was. You just clicked on it and it told you what to do and Bingo Bango, it was done...The only problem, of course, with Zoom, is making sure that

you're not talking over each other but we've sorted that out fairly quickly and it went well.”

One respondent, NF72, from this Dialogue group whom I interviewed via Zoom was having internet connectivity issues and it took us quite some time to finally make the connection online and speak face-to-face. She explained that:

When I first was trying to do Zoom I tried it on my laptop and my laptop is a 20 year old laptop. They could see me but they couldn't hear me, so I couldn't really participate. However, I have a cell phone which we use for emergencies. I realized that I could Zoom on that, so I did Zoom on that, but then that only allowed me to see the speaker and that was difficult, but at least I could do that. I contacted a computer person and when it was safe to do so he checked out my laptop and found that there was something not working in my laptop and so now, I have a little attachment, which allows me to be heard. There are challenges like that.

Dialogue 2

Dialogue 2, the smallest cohort, consisted of three respondents from the 25 person sample: 1 Dropout, and 2 Transitioners. These female individuals are between the ages of 70-80. One individual from this group believes the pandemic has not restricted their participation in lifelong learning, whereas the remaining believes it has. Similar to Dialogue 1, all of these individuals in Dialogue 2 had not participated in online or virtual learning before. Throughout the quarantine periods, one of these individuals opted for more social activities for enjoyment, whereas the other two undertook more self-improvement, capacity-building activities. These respondents feel that the social aspects

of lifelong learning were their biggest motivator for participating, however they do not disregard the importance that the educational attainment has for other older adult learners. These individuals were also very strongly discouraged by their online learning experience saying that the technology and use of computers was a big challenge to overcome. They are, however, quoted speaking to its importance in fostering lifelong learning throughout the pandemic and meeting restrictions. This group, similar to Dialogue 1, also believes that the lifelong learning opportunity is more about the topic of interest and less about being in a group with others of similar age. They believe that separating older adults from other age groups in the classroom is unnecessary, but that there still warrants accessibility issues that need to be acknowledged for older adults.

Motives

Dialogue 2 feels strongly that the social aspects of lifelong learning are a motivating factor for their participation. The purpose of lifelong learning for older adults in this dialogue group is the connectivity between peers and “making new friends...they [older adults] want to meet new people” (TF78). “You get to meet up” (DF71). DF71 also points out, “If it's not a pandemic, or even if it is, you get to socialize with other people which they're touting as this big deal. It's very important. You could live the longest, that's one of the indicators, I just read, as I was lifelong learning.”

TF85 feels that although lifelong learning provides the social connection that many older adults are seeking, the impact is missing because of COVID-19 restrictions:

Pre-COVID, it meant socializing, it meant being in contact with people, having discussions, and that's what I miss about doing any adult education courses.

Before COVID, I would meet perhaps one or two friends, we would have coffee,

we would go to the class, we were talking about the class and it was very much a social thing of going out to coffee afterwards and talking. And now in COVID, well if there's somebody that's done the same class as you, it's not got the same impact socially, it's not as good. I find that when I'm listening to a webinar or something I will be doing something else at the same time. I'm not concentrating. I might get part of the information, but it doesn't have the same impact as when I'm actually there.

I observed that all three of the respondents in Dialogue 2 also remarked on the dual purpose of lifelong learning “I think there are two main things. One, they want to have more knowledge, but I think basically it's social. [It] is a very important part of seniors' education” (TF85). Similarly, TF78 explained to me that much of lifelong learning, to some older adults, is about the educational attainment, but to her it is not of value, “The idea of going to a formal course with credits and stuff like that, it's not very appealing. But [the program], which is educational and also social in many ways, I think it's just been invaluable.” DF71 said “I have a [learning activity] that is Zoomed and it would serve two purposes, it would serve the purpose of people discussing [the topic] and it would serve the purpose of me seeing the people and talking with them, to a certain extent.”

Opinions on Technology

Dialogue 2 was one of the groups of respondents who felt very strongly that technology and online methods for lifelong learning are difficult to master and have deterred their participation. DF71 said:

Technology is very difficult for some people, frustrating. That, to me, is one of the biggest detriments for doing lifelong learning with technology. If it was regular [in-person] lifelong learning, it would be perfect. I don't see anything detrimental if it's live, with people. You have to go there, leave your house. But the one I find frustrating, I feel, is doing it with technology. Mostly because it's online that I don't really remember to do it [an online lecture, passive learning]. Sometimes I was challenged to get on to the Zoom call, but there was a person there, who was at the ready to help us, because there were many people who had trouble doing that. I don't care to use technology now, in many ways.

TF85 provided an anecdote about her volunteer work with the lifelong learning organization she participated in:

I don't like it. I'm beginning to be more comfortable. I'm in a simulator for [University] so occasionally I will do simulations for students, having to use Zoom. And the first time I had to do it, it was an absolute disaster; it was horrible and I didn't want to do it again. I really don't like being on Zoom all day and all night. My biggest problem was doing the simulations and there I am seeing the students. That was an enormous challenge to me when we first started. I thought that would be the end of my simulation life.

Despite the frustrations illustrated by the respondents in this Dialogue group, they still concede to the fact that technology is important in actually facilitating lifelong learning, especially during the pandemic. As DF71 describes, "I think it's very, very important. I think the fact that it is available is very important. It's just that, for me personally, I would seek out information that I was interested in a different milieu." TF78

agrees that technology is a “love-hate relationship”. She continues to state, “I am so grateful to Zoom and the other technological innovations, because it would be absolutely terrible to be in this pandemic and not have any way of communicating with my family or friends. But on the other hand, I hate tech. Mainly dealing with technology, dealing with Zoom. I think a lot of people have a lot of problems with it. I'm a little more comfortable than a lot of people, but I still hate it and I still have problems.”

With repetition, these respondents eventually got used to using videoconferencing platforms so that they could keep up with the social aspects of lifelong learning that motivated them to participate in the first place. The two Transitioner respondents from this dialogue describe their experience:

I have been using it [Zoom] since the pandemic started. When the first pandemic [lockdown] was called March last year the [program] just stopped. We only had one or two workshops left, so they just discontinued the whole thing. I was very annoyed about it because I had prepared a presentation and didn't get to do it. During that time from March to the following September when it [the workshops] went on Zoom, I was doing other Zoom things like with my family, so I was familiar with Zoom before I started the workshops. (TF78)

I'm ok now, I don't like it, but I appreciate that I have it now. But I seem to be working it out okay now. But that was a huge challenge and I was very sad that that would be part of my life that would have disappeared. I think that it gradually [got better]. The first time, I had five classes, which I was supposed to go from class to class to class and I couldn't do it electronically. Now I've got one class

[link], and I can check into that class and it's much easier. I think it was a real challenge for many of the people. It was difficult. (TF85)

Dialogue 3

Dialogue 3 consists of 12 individuals (7 female) between the ages of 50-90, being the largest and most diverse dialogue group with respect to age. All of the male respondents from this sample fall in this Dialogue group, except for 1 who was described in Dialogue 1. One respondent is New, and the remaining 11 have transitioned from in-person to online lifelong learning. Five of the respondents in this dialogue group have already participated in online or virtual lifelong learning, before the pandemic. One respondent remarked that they would choose not to continue with online learning, and the others stated “Yes”, “Maybe” or “Hybrid” to continue with the online format. This group is labelled as instrumental in their lifelong learning approach as they stated lifelong learning is beneficial for brain health, good for the body and it can provide physical benefits and escapism. The individuals in this group believe that the cognitive benefit of education is in the fact of being challenged. Challenging the brain is their way to slow cognitive decline. This group is also very interested in technology use for lifelong learning and have expressed positive sentiments about it. All members of this dialogue group believe that older adult lifelong learning should be intergenerational; except for one participant (amongst all four dialogue groups) who believed it should be a separate learning activity from other age groups. This group strongly believes that there are accessibility issues that need to be addressed in lifelong learning participation. Older adult disabilities may become barriers to access, but attaining new knowledge is possible

within any setting, with any instructor or peers, regardless of age, when it is accommodating of their needs.

Motives

I observed in my interviews with the individuals from Dialogue 3 that much of the motivation to participate in lifelong learning was around the notion that continued education is a good way to keep the brain active and the ideals around brain health. For example, TM88 told me “Every time I read something about aging it says, ‘you must keep the brain active’”, and that a benefit of lifelong learning is “using the brain”. TM74 had a similar response, “I think you need to keep your mind active the moment you start to lose the ability to think. New ideas are stimulating. I think it's important. It's why I got involved in [lifelong learning organization].” TM70 said he is motivated to be a lifelong learner in order “To keep my head full”. TF65 shared the following sentiment “I think it just keeps your brain functioning optimally. I find after I've learned something new, I can apply it in different ways if it's that kind of information”. With respect to lifelong learning being geared towards older adults, TF65 also said “I don't understand what that is because, in my mind, I'm still 21. My body doesn't cooperate, but my mind thinks it is.” TF60-70 explained that lifelong learning contributes to happiness, which is why she participates, “if you're happy, oxytocin, it's good for the brain, it's good for the body, so it all works together.”

Three respondents referenced cognitive decline and how interventions such as lifelong learning have motivated their participation:

I think in terms of cognition, I have some understanding of how the brain works, not so much the elderly brain, but I have followed some of the literature and

interest in that topic, and certainly both from a cognitive standpoint, the old saying 'if you don't use it, you lose it', is really, really true. You feel like you're expanding your horizons, from a cognitive perspective. I suspect that there are things happening in the brain that will enhance one's connections and maybe maintain some better semblance of things like memory. If you come from a family where there's a known history of dementia and there's a genetic component, I understand very well all the stuff you want to learn in the world may not change that, but for many of us, I think that learning does some enhancement for more prolonged better cognitive activity than not doing something. (TF76-2)

Some people it's just to keep their mind active and I know for me with family medical history it's like keeping your mind active, making sure that you're keeping those cognitive skills. That's something that I'm mindful of. (TF58)

Because the brain needs to be used, and we have a lot of the brain that we don't use. Otherwise, you might develop Alzheimer's or something like that. Keeps you young; it keeps you interested...It makes my brain think. It brings back memories of what I learned before. And I'm enlarging by bringing new knowledge. (TF74)

And another respondent referenced how lifelong learning may be a motivator because it can extend his life, "There's two things that I would mention. There's a couple of individuals in the lifelong learning group who are in their 90s and they often say that the reason they have lived to such an advanced age is because of the opportunities that the program has given them" (TM84-2).

Another motive to participate in lifelong learning for this dialogue group is that it presents the opportunity to learn something new that they perhaps did not have the opportunity to be involved with previously. NF59 shared with me that after she retired, she enrolled in different programs and activities that she had never done before or unable to try while she was working full time: “I used to always want to do things that I wasn't necessarily good at. I really want to make sure that I was willing to do [something that made me uncomfortable].” TF76 shared that a motivation to participate in lifelong learning is because it is a way to “explore topics that have interested them [older adults] and maybe try out a few new ones in a risk free environment.” As TF76-2 explores lifelong learning, her preferences change “I think it's just expanding your mind and thinking about, with some curiosity, about where you want to head. Does that interest you enough to pursue it? And for me, certain things I'm sure I'll do more, but certain things are more interesting to me right now, and that will evolve as time goes on.” Despite their diverse backgrounds and motives, the individuals in this dialogue are motivated to try new things and continue learning. TM70 told me, “For example, some of the courses, or even the talks that we go to are really deep, they go in depth. It's quite interesting how some people might change their ideas, they had initially. Increasing your area of knowledge.”

Opinions on Technology

Respondents in this dialogue are very comfortable with technology; they used it frequently in their professional years and feel adept at learning new concepts, programs and teaching their peers. Many of the interviewees in this dialogue are self-proclaimed technology enthusiasts and experts. TM84 said “I'm an internet-aholic. I have an iPad,

iPhone, Apple watch, Apple pencil.” TM74 shared that his background helped him succeed with technology:

I'm a fairly consistent and probably better than average, knowledgeable user of computer systems. My work background is in finance and accounting. I've been using computers for decades. I've used PCs, spreadsheets, etc. So I would consider myself a sort of talented user. With the advent of COVID, we learned how to use Zoom. That's been very beneficial; Facebook messenger video conferencing. We have multiple computers in the house, even though there's only two of us.

TM88 is also interested in technology because of his background, “having been trained as an engineer and I worked around the world in many, many countries I got very interested in their cultures. So, and when it comes to technology, engineering is my favourite topic...We don't know enough so, that's the reason why technology interests me.” TF65 shared that her remote working career helped her transition into the videoconferencing platforms often used in lifelong learning because of the pandemic: “I was working full time in a remote situation. My team was in another city and countries. I would physically go into the office periodically for specific business events or social activities that were happening.”

Some of the respondents in this group are also becoming the go-to's amongst their peers for support with using technology in lifelong learning. TF76-2 said “I've been kind of a local techie for friends, etcetera, in helping facilitate many of my friends who were in their late 70s early 80s and trying to navigate the computer, for example”. Additionally,

TF76 said “I learned how to set up my own Zoom meeting with one other person and that's usually enough, which is really nice.”

Even TF60-70 went as far as to set up workshops for her peers so they could exchange knowledge on technology use during the pandemic:

I've just started a Mac users club, going to be called Tuesdays with [participant's name]. Every two weeks we're going to have, bring your Mac, bring your iPhone and let's talk about how can you use it better because I'm a bit of a nerd when it comes to shortcuts and stuff. And to me it's just so much fun to be able to offer information to people that are interested. I put myself in the same shoes of those people that have never used Zoom before and until they feel comfortable. And you give them a reason, how they can use it and how they can enjoy it...what my mission in life is is to try to teach my Mac people how they can better use their iPads and their Macs to enjoy technology and Zoom. Because, ultimately, I think, if not hybrid, this [no in-person lifelong learning] is going to go on for at least another year, there's no question.

Finally, TF58 notably mentioned how the access to internet during this self-isolation period has been so detrimental to some:

I would say technology is a lifeline. I think it's been a lifeline for quite a long time...but I think this last year has really demonstrated how the ability to have access to the internet [is so important], having high speed internet. My 85 year old father doesn't have that and it's been a totally different world for him than it has been for those of us that can kind of reach out or take advantage of opportunities that have moved online...he would probably love a lot of these activities, but he

doesn't have the technological skill set, there is no high speed internet even available where he is in the country.

Similarly, TM70 noted that although he had previous experience using Zoom, “Yes [there were challenges with Zoom at the beginning], because probably half the people aren’t very tech savvy, or they use different platforms”.

Dialogue 4

The last group, Dialogue 4, consists of 4 female individuals between the ages of 70-90. One respondent is New, and the remaining 3 have transitioned from in-person to online lifelong learning. Similar to Dialogue group 1 and 2, these respondents have all participated in online or virtual lifelong learning for the first time, because of the pandemic. One respondent remarked that they would choose not to continue with online learning, and the other 3 agreed to continue with the online format. This group is also labelled as instrumental learners, like Dialogue 3, as they strongly believe in the impact that learning and education can have on well-being and health, but most importantly they believe in education's impact on capacity and independence. They are interested in lifelong learning for knowledge and acquiring a new perspective on life. These individuals also struggled with technology that facilitated their lifelong learning, and do not favour this method, which is how they differ from Dialogue 3 who welcome the challenge of using new technological practices and devices. Similar to the three previous dialogues, this group also believes that older adults should not be separated from other age groups in the lifelong learning settings and that accommodations need to be made for older adults so they can participate.

Motives

There were many comments made about lifelong learning and its role in extending their perception of a healthy life. The individuals in this dialogue group spoke about how they are motivated to participate in lifelong learning because it keeps the mind active and healthy. For example, older adults participate in lifelong learning, as TF83 stated, because “There are many, many reasons. Some of them, because they have read and learned that keeping a brain active will mitigate against dementia or Alzheimer’s. That’s one thing.” TF80 shared similar sentiments “Also to keep my mind active as well...Having the online learning has been very helpful to my mental health.” Finally, TF84 shared that “I think that as we get older sometimes our cognitive abilities decline and I really think if you’re in a position where you do participate, you may not remember everything, but I think it does stimulate you to not just be in bed or watch TV, but it’s an active process that engages your mind. I don’t know how much I remember, I had one [class] today that was very complicated.”

NF73 shared her thoughts about motivations to participate in lifelong learning, including her familial observations being a motivator:

I think it extends your life. You become more interesting because you have things to talk about other than aches and pains and illnesses and people dying all around you. It gives you something to focus on that’s positive. I think that it not only enhances your life, I think it extends your life because you don’t get depressed when you have nothing else to do except focus on negative things. And there’s lots of negative things as you get older, you can’t help that. I think learning is just good. I don’t think you should ever stop learning. My father passed away at 94

and when he was in his 80s, he learned how to use a computer. He learned how to do digital photography. He was always engaged in things and I think that kept him alive and kept him going.

This dialogue group of women also strongly believe that a motivator for lifelong learning and continued education is that obtaining education creates independence and improves capacity. TF80 explained why her past with education has motivated her to pursue lifelong learning:

I value education about the highest thing, in all this wide world. I had learning disabilities as a child, which at that time, 70 years ago, they weren't identified. I remember, specifically in grade seven we had to write an essay for Education Week and I wrote on education is the key to the future and I hold that so dearly in my heart. I put a great priority on it for my own children, my grandchildren. I have volunteered at schools for a number of years and to try to nurture and help those that are having difficulty. It is everything, really.

TF83 also described similar sentiments:

Education, to me, is like food and water. I think education is something that is the most important thing when you're raising your children. I think the Latin for education, educere, means to lead out of. So [education] is leading us out of, if not ignorance but, it's leading us out of mindsets that may be inaccurate. Education is something that you participate in or are involved in from cradle to grave.

Interestingly, this group of female respondents also strongly believes in the importance of education and learning for women. NF73 explained that older people are motivated to participate in lifelong learning because of their preconceived reasoning,

“You have to use your education so that you can always support yourself and never depend on anybody else.” Two of the respondents shared the following:

Others feel that perhaps they want to learn something outside what they did their whole career. In this generation, I think a number of them may feel that they were, women particularly, not able to go to post secondary. Many women were two things: you could be a nurse or a teacher and then get married. It's looking for psychic income to that fulfillment. Social ability. Brain work. (TF83)

Some of my grandchildren are girls and I've always said to them, you must learn, you must be independent; you must not look for a man to support you. Company is fine, but you must be your own individual and your own person, you can do this through learning. I think that everyone has a way of reaching his or her potential and education helps, learning helps. My advice, it hasn't changed for women, I still think women have to learn to be independent. I just can't overstate how important learning is. I tell my kids [and they say] ‘Another course Bubbe, another course?’ When I stop learning, just take the shovel in the dirt, throw it over me. I really believe that whether you're learning from someone else or doing it independently of anyone, that's what is important. (TF84)

Opinions on Technology

Within Dialogue 4, I observed that these respondents appreciate the importance of technology and its role in lifelong learning, presently. However, they did experience challenges with transitioning to online learning as it was all four of these respondents first time with online or virtual learning, similar to Dialogue 1 and 2. The challenging experiences, however, were not enough to warrant not returning to online learning for all

but one respondent. When asked to describe their thoughts on technology, NF73 stated that technology is “a nightmare”. She continues to share:

In this generation, I was never very good at technology...I came to a computer very late. I have an iPad. I am okay with doing everything, but if I have to do anything like we had to download [forms], even though it was a problem with the app, it took me about three days to do everything and figure it out. It's hard. I think that's fairly typical of my age group unless you've been good in technology your whole life. I find sometimes it's hard. It takes me longer to do something on the computer than it used to just by writing it out.

When asked for her opinions on technology, TF80 said “I don't really know. It's just there and it's something that I'm not very savvy with and it can be very helpful. There was an assignment where we had to do a video...talk about technical. That was challenging for me, but anyway it got done. It was a bit of a challenge to get it started. But it's a bit easier now.” TF83 shared sentiments about technology that were two-sided:

It is a beast and a gift. It's a beast because I am of the generation that, when I started to work at an ad agency at the ripe old age of 18, didn't even have an electric typewriter, air conditioning at a New York ad agency. I'm not proficient with technology and therefore I got paralyzed sometimes using it. It's a pain in many ways. On the other hand, it's a gift, because the past 14 months without technology, I would not have been able to take my courses, visit the Frick Museum in New York on Friday night, cocktails with a curator, it's my favourite day of the week.

Likewise, TF84 said “[Technology] has been a lifeline...for me, being able to access a service online is wonderful. I’m fortunate that I have my iPad. My computer won't allow me to use my search engine to get anything so other than emails it's useless. But I don't know what else I would participate in.” NF73 also noted that although technology has created more connection with people who are at a distance, it is not of the same quality, “I’ve been more in contact with people, but sometimes I get off the phone or off Zoom and I feel worse because I just want to hug them. It's the physical contact that I miss.”

Three of the respondents in this dialogue group shared their negatively perceived experiences with technology over the pandemic, in lifelong learning:

Also, in the [course], the virtual one, I don’t know what she [the instructor] was trying to make me do but it was totally frustrating, I was not able to do it...I wasn't successful in doing that, partly because I thought she was maybe getting a little agitated, along with my agitation [laughing] and I just thought ‘I’m going to drop this’ and ‘I don't care about this piece’, so I just never return to that and I just found [out how to do the task in] a different way...I think it had to do with having a mini iPad. It doesn't have like, for instance, I don't think I have recording function. Where you have that with a desktop computer or a laptop. The virtual one [class], the instructor was very different. Online, it was very different from in-person. In-person we had a whole room and we were doing things and you know it's very confining online. She's done a great job [the instructor]. She is technically savvy and she can do it, whereas the one that we had in-person she's done it for 10 years and she's not as technically savvy. She did a fine job when we were in-

person. I think we were fortunate to have this woman that was able to do it. They say she's technically savvy, she is younger. I think she's doing some work at [another] University in their performing arts. (TF80)

Technology is, if you are already in that mindset it's great, but if you're someone like my husband or me it's a stress factor. There aren't enough supports. I'm sure you've talked to many other people who are older adults who thrive on technology, who understand iPhones, get the newest ones, all of that and that's fine. But there's a big void for people like me, which also I think precludes them from getting involved with our later life learning when you need technology. Many of us were concerned about online learning, how we were going to do the presentations. We got in touch with one of the tech teams and they walked us through how to screen share and all of that. I still get mixed up sometimes. I guess I learned more because of COVID-19 and technology. I have had to learn a little, improve on how to handle the computer. (TF83)

For this university course called [program name], I did have to send an application. And she [administrator] in turn gave me access to a link, however, someone got into my email, and they corrupted my email address and I finally got someone at Rogers, a woman, who was brave enough to try and undertake to rectify it. She did, after much searching. That link for the lecture, I use someone else's link to get on. She forwards it to me because they could not input my email address again. That was one thing that didn't go right. I work with a young girl who's trying to become a little more proficient in English, and so I Zoom with her on Sundays. I've had difficulty with Zoom, maybe too many people are using it at

that time, I don't know. So it isn't perfect, it has its challenges. You have to be very patient, be willing to go beyond the challenges; sometimes it's very frustrating. (TF84)

The key findings that have been presented amongst the four Dialogue groups have now provided me with the opportunity to discuss, in depth, the factors that help respond to my research question. The four discourses in this section have been populated and examined and I will now respond to my interpretation of the interview responses based on the motivations to participate in lifelong learning, the respondents' opinions on technology and how these factor into the geragogical model.

Chapter 5: Discussion

In this final section, I will provide my interpretation of the findings of my study, the contributions they make to our understanding of geragogy, how knowledge from the study is to be disseminated and a picture of COVID-19's impact on lifelong learning for older adults and the future of its practice. To better explain how I interpreted the findings discussed in Chapter 4: "Findings", let me first revisit how I analyzed the information from the interview transcripts in NVivo. By conducting a line-by-line review of the interview transcripts, the questions asked in the interviews became subcodes that were listed under top-tier codes of categories. The top-tier codes were created to encompass the interview question codes, and intuitively became four: barriers to access, opinions on education, opinions on education for older adults, and opinions on technology. The majority of the questions from the interview guide fell within the last two, opinions on education for older adults and opinions on technology. This helped me in determining that these two were the top-tier themes within the interviews. A high level line-by-line review was then conducted again so that I could group interview participants by their motivations to participate in lifelong learning as older adults, and their opinions on technology use. A participant classification table was then restructured to demonstrate the four groups of discourses that I uncovered.

As such, the explicit four dialogues emerged, as referenced in Chapter 4: "Findings". Some of the interview respondents are motivated for social reasons, some are motivated for more instrumental, utilitarian reasons. Some respondents are affected positively by the use of technology in pursuing lifelong learning, while others are affected negatively. The four discourses were populated based on the polar positioning

they held for motivations and opinions on technology. This informed me that one discourse does not imply the other. An individual who is motivated by the social benefits of lifelong learning can be both interested in using technology, or conversely, they could be completely frustrated and unwilling to use it. Furthermore, an individual who is motivated by the instrumental factors of lifelong learning can also hold either positive or negative opinions about the use of technology for learning. These four dialogues are distinct in that they each hold opposing opinions about the two issues raised (motivators and opinions on technology) but there were no major identifiers within the groups that could characteristically distinguish one from another.

I examined each dialogue group to see how they differed from one another on demographics such as age, gender, marital status or educational background. I also attempted to understand the groups differences based on other data such as their previous experiences with lifelong learning (had they participated in a group setting, in-person settings, previous online experiences, or self-led courses?). I explored whether the activities they pursued during the quarantine and self-isolation periods of the pandemic were factors in the dialogue groupings. I also tried to identify whether the dialogue groups could be distinguished by the respondents' opinions on returning to online, virtual learning, their previous experiences with online models, and whether they believed the pandemic restricted their lifelong learning endeavours. Interestingly, there were no distinct characteristics that I could label each dialogue group with based on these characteristics: these discourses express preferences, values, and perspectives that seem to be irreducible to identities or even experience from the recent past.

This leads me to believe that these factors, such as previous experience with online learning, for example, are not impactful enough to influence an older adult's opinion on technology use or to be linked to their motivation to participate in lifelong learning in the first place. Other major characteristics such as the learner category (Transitioner, Dropout or New) also did not imply the motivation opinions or technology opinions of these older adult learners. The two Dropout respondents identified with the social motivation side of the motivators to participate in lifelong learning, however they were differentiated by their opinion on technology. One felt that the use of technology was easy enough to grasp whereas the other preferred to not use technology for lifelong learning. Furthermore, because the Dropout category of learners only consisted of two individuals, it would be incorrect to deduce that all learners who dropped out of lifelong learning because of the pandemic are only motivated by the social and community aspects of lifelong learning. This is certainly a limitation of this study that Dropouts, or those excluded from lifelong learning by the use of technology during the pandemic, could not be approached as effectively as members of other groups, precisely because the pandemic imposed the use of online means to conduct interviews.

Similarly, the New learners category, those individuals who began participating in lifelong learning after the start of the pandemic, are found in three of the dialogue groups. The only dialogue group they did not appear in was the Dialogue 2 group where the motivations to participate in lifelong learning were social in nature, but the opinions on technology were negative. Because these New learners had just picked up lifelong learning throughout the pandemic, only online methods for participation were available. We may be able to infer that these New learners, who are motivated to participate in

lifelong learning regardless of whether it is for social or instrumental reasons, view technology use as positive. Potential New learners who view technology negatively likely would not have begun participating in lifelong learning during the pandemic because online options were the only ones available.

Finally, the Transitioner category respondents were found in all four dialogue groups. There were more participants who fell in this category than the New or Dropout category because of the nature of my recruitment. Respondents were more likely to respond to the recruitment if they are circulating within lifelong learning organizations and are already a part of this community. Either way, the Transitioner learners fell within each dialogue group because they were forced to transition to online learning from in-person lifelong learning regardless of their opinions on technology or motivation to participate. They chose to continue lifelong learning within their group or learning organization using videoconferencing and other online methods, rather than drop out entirely. Talmage et al. (2020) recount many lifelong learning organizations that have managed to transition their older adults to online Zoom formats for participation which was similar to the anecdotes that the Transitioner interview respondents shared with me.

My Interpretation of The Findings

In this section, I will explore my interpretation of the study results in Chapter 4: “Findings” based on the opinions shared about motivations to participate in lifelong learning, the opinions shared about use of technology for lifelong learning, and how self-identified gender may play a role in the categorization of the dialogue groups.

The Two Alternate Motivations to Participate in Lifelong Learning

Motivation to participate is an important aspect in the learning process for older adults (Gonzalez et al., 2015) as they are typically not enrolled in for-credit courses or academic programs necessary for professional development or advancement. Therefore it was important that motivation be explicitly defined within my group of respondents. As previously explained, two different motivations (social or instrumental) emerged from the interviews: even though these two motivations are compatible with each other, it was notable that respondents put emphasis on one only and almost never put equal weight on both motivations. This is why I could identify two dialogues along that dimension, rather than one only, if all respondents had put these two motivations on an equal footing. This grouping of my participants based on the two views of motivations was not known to me at the outset of my research. I hypothesized that older adults were interested in participating in lifelong learning both because of the notion of improved brain health and well-being, and that lifelong learning programs fulfill social and interpersonal needs. There are, however, more benefits to lifelong learning for older adults that may be motivational factors, based on the literature. Continuing education for older adults can also improve psychosocial outcomes including self-esteem, self-efficacy and can increase social integration (Hammond, 2004; Yamashita et al., 2018) in turn improving overall health. Therefore, I assumed that many older adults pursue lifelong learning to maintain the ideals of successful and active aging (Narushima et al., 2018). These benefits of self-esteem and self-efficacy did not come up in conversation amongst the interview respondents, however the social integration was an important factor amongst some of the respondents who are grouped under social motivations for lifelong learning.

Within this *motivators to participate in lifelong learning* dimension, the social motivations were evidenced amongst nine of the 25 participants, in Dialogue groups 1 and 2. These groups truly believe in the community-building benefits and socialization aspects of lifelong learning being of utmost importance. They also credit lifelong learning as being an important mechanism to improve interpersonal and social skills outside the classroom. It was reassuring to hear from the respondents that the COVID-19 pandemic has not entirely eliminated their means to attain social activity. Although the social aspects of lifelong learning are crucial to their motivation to participate, many of the interview respondents used their newfound videoconferencing skills to encourage virtual discussions with peers, friends and family. However, it was recognized by the respondents that there are still barriers to participation such as computer and accessibility difficulties, or barriers because of physical or mental capabilities with using computers.

The alternative motivation to participate in lifelong learning amongst these older adults was the instrumental motivators such as improved brain health, cognition and physical benefits. Sixteen respondents of the 25 interviewed were categorized under the instrumental motivations group. There were many comments from these individuals about brain health and how learning can help extend life more meaningfully by improving cognition. I was surprised to hear a few anecdotes from respondents about their stories of peers or family who lived long, crediting that their learning and efforts to experience new things extended their life. These narratives that they may have carried within themselves throughout the age course potentially could have motivated them to participate and sign up for lifelong learning activities.

There is no doubt, older adults are not motivated by the same factors as younger adult learners who are motivated to pursue continuing education for academic and professional reasons (Pstross et al., 2017). The questions about intergenerational learning and the geragogical method must keep these motivational factors in consideration when planning programs that may involve diverse age groups or educational experiences. The existential value that lifelong learning provides to older adults, social or instrumental, is rooted in their personal choice to pursue continued education.

Personal and Shared Opinions on Technology and its Usage

I was not surprised to see that although some individuals struggled with technology in their transition to lifelong learning online, they did not all disagree with continuing using videoconferencing and other online methods for learning after the pandemic is over, when returning to in-person settings is permitted. In fact, only three respondents of the 25 stated that they did not wish to continue online learning. As Hansen et al. (2016) claim, adoption of technology is growing amongst older adults. This finding is consistent with Dorin's study (2007, p. 140), where they demonstrate that "older adults are capable of learning in a hi-tech learning environment once thought of as relevant only for the young." It is also observed in the results of my study that, with practice and assistance from peers, many older adults are able to successfully participate in online settings and using online methods.

It was stated in the interviews that those individuals who are perhaps more cognitively advantaged may be in a better position to actually attain the benefits that online tools provide to older adults, as is supported by Freese et al (2006). Older adults who may not suffer from any cognitive decline may be more inclined to use the internet

and technology for their lifelong learning activities. Some respondents mentioned that cognitive, as well as other physical disabilities such as hearing loss or vision impairment, may prohibit participation online with the use of computer screens and audio output. One of the respondents said that his experience online with lifelong learning has improved as he uses hearing aids. He finds it much easier to participate when he is in front of his screen and able to see all other participants in the classroom directly, as opposed to in the in-person setting where some individuals may be sitting behind others in the room.

As mentioned previously, the number of respondents in this case study who favour technology or have positive experiences with it was much higher than those who had negative opinions about technology and online lifelong learning. This can be due to the fact that those respondents who participated in these interviews were recruited using email and through the online hosted lifelong learning organizations, and the interviews were conducted via Zoom. My recruitment and data collection methods therefore controlled the exclusion of older adults who fear technology or dislike online tools.

Gender

One interesting result from the categorization of respondents was that all those individuals who had proclaimed negative opinions about technology and their experiences with online lifelong learning were women. There were no self-identified male respondents in the Dialogue 2 and 4 groups, which were the groups that stated they did not like or enjoy technology. There were also more women who were interviewed in this study, 19 of 25, which is consistent with research on the demographics of lifelong learning organizations (typical members are women, white and/or college or university-educated previously; see Hansen et al., 2016; Hansen et al., 2019).

The women in this study were also very forward with their opinions on women and education and how throughout their upbringing, many women were not encouraged to continue with post-secondary education. The opportunities available to these older adult women when they reached the traditional post-secondary education age were not as diverse as the education opportunities that we have now seen grow in the past few decades. As one respondent claimed, nursing or teaching were the typical professions that women would study to enter the workforce. Now that the women of this time are reaching retirement age, and are able to participate in leisure activities, they are gravitating towards activities that they did not have the opportunity to explore earlier in life.

Examining The Contributions To Geragogy

Should older adults be separated from other ages in the classroom? This is the core of the gerontological discussion of geragogy. One crucial question that I asked the participants of this study was their opinion on education that is specific to older adults. Some responded without skipping a beat but others asked for clarification, to which I often prompted them with a follow-up question such as asking their opinion whether education for older adults should be separate from other age groups, whether that is impactful, and the reflexivity of older adults' needs in the learning setting. For the majority of respondents, the old adage is true, age is just a number. As I continued to explicitly narrow down my review of the responses to the questions asked about opinions on education specific to older adults, and the benefits and negative aspects of it, the same theme was appearing: intergenerational.

All respondents provided their answer to me that, from their perspectives and experiences, lifelong learning for older adults should not be segregated by age, and lifelong learners should not be separated into age groups. There was only one respondent who bluntly stated that older adults should be separated from other age groups in lifelong learning activities. All respondents agreed that lifelong learning programs need to accommodate the uniqueness of older adults. This rings true to the overarching themes of geragogy in which older adults have unique needs (Dorin, 2007). But despite these unique needs, the older adults in this case study want to ensure that in the learning setting, their needs are not overplayed. For example, NF73-2 stated “A couple of things [learning activities] that I went to, the guest speaker talked to us as if we were kindergarteners, which was really very aggravating.”

With respect to separating age groups, some of the respondents also said that the pursuit of lifelong learning is based on the individual's motives. According to these respondents, lifelong learning should be based on the user's interest and personality, whether they wish to pursue a certain topic or subject and in the medium that best suits them. Older adults are often boxed into passive or active learning style, but there should be more flexibility to adjust to the personal motives for pursuing the learning activity, personal abilities, and their intended outcomes. Many of the respondents I spoke to questioned the peer learning models of lifelong learning, where another older adult lifelong learning participant in the group acts as the facilitator or teacher in the meeting or class amongst their peers. The respondents asked themselves if it is more or less important to have an individual who is a peer learner facilitating a learning activity, rather than an expert, from any age group.

The idea of passive and active learning is also an interesting concept because passive learning would be considered, as demonstrated by the respondents, as just listening to a lecture for example, and walking away from the activity without additional follow-up or homework required of the student. It is easy to see how this type of learning would be most appealing to older adults as they may have reached a point in their lives where they simply want to participate in a learning activity that requires minimal effort. As many respondents mentioned, old age is less about academic and professional advancement and passive learning would appeal more to older people. But some of the other respondents said that, particularly if they wish to participate for social motivations, active learning where engagement and cooperation amongst peers is required, would be the ultimate approach for older adults in lifelong learning.

Finally, many of the respondents spoke about creating lifelong learning that is accommodating to older adults, that takes into consideration the expectations of these learners. The older adult is to be accommodated, but assumptions are not to be made about what accommodations they require. This would apply to the organization developing the program, the facilitators or class instructors and also peers within the learning setting. Expectations need to be communicated across this educational process so that there is a clear definition of what older adults are receiving and what the organization or facilitator is offering. The organizations need to communicate the expectations of students so that if barriers exist, older adults can be accommodated. These expectations can be developed in a cooperative manner that encourages collaborative and meaningful learning (Martinez-Alcala et al., 2018).

As mentioned in the literature review, the Age-Friendly University principles are important standards to begin improving the online lifelong learning programs that currently exist. Pstross et al. (2017) add to our understanding of four areas of good practice in Age-Friendly University principles which consist of the younger learner, the older learner, the University (or institution that is facilitating lifelong learning) and the community it is situated in. Some of the respondents may interpret intergenerational learning as only the relationships between an older learner and a younger learner, but the principles of Age-Friendly education would encompass the dynamics between these two groups of learners and also the host institution and the community to encourage and foster this positive learning relationship and environment.

The respondents from all four dialogue groups were not able to provide me with conclusive suggestions or recommendations on how to better implement these geragogical and age-friendly principles in lifelong learning, as this was not the intention of my study. However, as mentioned, all respondents believe that lifelong learning for older adults should be recognized as a different learning method than of younger learners, but that they do not need to be learning in isolation (except for the one respondent who believed that older adults should be in separate learning groups). Older adults are often perceived to be “a relatively homogenous group” who are at a disadvantage in adult learning models, and that any type of learning, i.e. passive or active, will benefit an older adult (Formosa, 2012, p. 40). The traditional lifelong learning models may be influenced by the beliefs that all learning is beneficial to older adults. Therefore, this thesis can support the research on geragogy that not all discourses of lifelong learners are reducible to identities or recent experiences. We need to question the needs of our lifelong learning

audience more critically to ensure their interests are being served by not reducing their learning style based on our implicit biases or what we believe to be educational.

Suggestions for Future Studies and Programming Recommendations

Besides my contribution to the literature of lifelong learning, we have learned more about COVID-19's relation to this. COVID-19 encouraged this experiment to take place, and this pandemic experience has allowed people to find preferences within lifelong learning, i.e. hybrid or staying online entirely because it fits their lifestyle, or seeking only in-person facilitation. This study can be useful to the industry of lifelong learning facilitation. Six interview respondents in this study indicated they want to learn in a hybrid environment following the rescinding of public health meeting restrictions. The hybrid models of learning are likely new developments that will persist in the future amongst all age groups.

There may also be instances in the future where older adults could experience health risks again, and where the hybrid model would be helpful for individuals who are self-isolating temporarily. Organizations have now heavily invested in this technology and structure, including the logistics to facilitate online learning, and adoption of the mindset to learn online. These study results will be important to understand how we can use this as an example in future settings, by better appreciating the motivations and opinions on technology that older adults hold.

Lastly, the case study methodology I employed may act as the exploratory phase in collecting data to determine whether further investigation is “worthy” (Yin, 2012, p. 5). My research could be seen as a precursor to further research, for instance studying in further detail the embedded dialogue groups as single-cases to determine how their

experiences can be used to improve the facilitation and organization of lifelong learning based on the unique motivators and opinions on technology (Yin, 2012, p. 8). I answered my research question by recording how older adults have interpreted the transition from in-person lifelong learning to online method, however, more critical analysis of the specific dialogue groups and interpretation of how their needs could be accommodated in lifelong learning settings based on the ideals they shared would now be the obvious next step of research.

Knowledge Dissemination Plan

Dissemination of these results will be important to foster quality improvement in lifelong learning development and implementation. Although there are no finite research outcomes that can critically affirm whether older adults are motivated to participate in lifelong learning by certain factors, or whether online learning is a feasible method, the understanding that is gathered from the interview respondents can help program developers to better appreciate the diverse groups of older adult learners.

Because of the investment many of the respondents to this case study have in lifelong learning programming and administration, it was crucial that I provide them with the opportunity to be notified of the final thesis results. I will disseminate a lay abstract and executive summary of this work to the respondents who consented to receiving the dissemination of results at project completion, which was noted in the oral consent log (see Appendix G).

Concluding Thoughts

From my experience, this pandemic-induced phenomenon is not unlike other scenarios where minor or major change deeply affects societal behaviors and routines.

People can learn to adapt to any new changes, and there will always be a proportion of individuals who adapt quickly and those who become late adopters. Some individuals will thrive and take the opportunity to teach each others their newly acquired skills. This is evident in this research; some older adults took on the transition to online learning as an opportunity to help increase the skills and capacities of their peers. Others found that the experience was difficult and they needed to tap into the resources made available to them by the organizations, or using recommendations and tips from their friends. Other older adult learners have now been able to identify the needs they must meet in order to succeed in lifelong learning should the hybrid or online models continue. This is of utmost importance to program developers and administrators. The identification of *what went wrong* and *what went right* throughout this pandemic experience will be crucial to effectively run lifelong learning programs with certainty that we are serving the learners, regardless of their educational background, expertise in using technology and, of course, motive to learn.

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Appendix A

Email Recruitment Script (and Reminder) sent on Behalf of the Researcher By the Holder
of the Participant's Contact Information

Email subject line: McMaster Study - Videoconferencing for lifelong learners during the pandemic

Email body:

Dear {Students/Users/Colleagues},

I hope this email finds you well.

Jocelyn Badali, a McMaster student, has contacted {your organization} asking us to tell our students about a study she is doing on the use of videoconferencing for lifelong learners during the COVID-19 pandemic. This research is a part of her Master of Arts program in Health and Aging at McMaster University.

If you are interested in getting more information about taking part in Jocelyn's study, please read the brief description below and contact Jocelyn directly by using her McMaster email address badalij@mcmaster.ca or phone number 647-987-3305

The researcher, Jocelyn, will not tell me or anyone at {your organization} who participated or not. Taking part or not taking part in this study will not affect your status as a student or any services you receive here at {your organization}.

Jocelyn Badali is inviting you to help improve lifelong learning programs and courses for the future of continuing education for older adults. Your help is needed by participating in a private, online interview that will take approximately 30-45 minutes. She is interested in learning from you about the experiences you have had transitioning to online learning formats, or withholding your class enrolment, and how the pandemic has impacted your continuing education goals. Jocelyn is interested in speaking with participants who:

- are transitioning from in-person group learning or facilitation,
- OR have recently dropped out of lifelong learning activities,
- OR are brand new to lifelong learning

You will be only be eligible for this study if you:

- are 50 years of age or older
- are pursuing/have pursued continuing education/lifelong learning
- have access to internet and a device for videoconferencing (participants without access to internet and/or device, and who wish to participate may be able to participate using alternate interview methods)
- are English-speaking

Attached here you will find the **Letter of Information / Consent** for this study that gives you full details about the research. If you agree to participate in the interview, Jocelyn will go over the Letter of Information / Consent together, in addition to confidentiality information pertinent to your participation at the time of the interview.

As the interview will be conducted via Zoom and recorded, the possibility of risk must be brought to your attention. The study will use the Zoom videoconferencing platform to collect data, which is an externally hosted cloud-based service. Please note that whilst this service is approved for collecting data in this study by McMaster Research Ethics Board, there is still a small risk with any platform such as this of data that is collected on external servers falling outside the control of the researcher. Jocelyn will make every effort to contain and protect the interview files from external audiences, and all of the participant information you provide, in addition to administrative information such as your name and email address will be de-identified and not released within the final research outcomes. If you are concerned about this, she is happy to make alternative arrangements for you to participate.

If at any time after you have agreed to participate in this research, you can notify Jocelyn if you would like to discontinue your participation, or be completely excluded from the study. Your interview responses may be withdrawn after the interview, up until May 1, 2021.

The study has been reviewed and cleared by the McMaster Research Ethics Board. If you have any concerns or questions about your rights as a participant or about the way the study is being conducted you can contact:

The McMaster Research Ethics Board Secretariat
 Telephone: (905) 525-9140 x. 23142
 % Research Office for Administration, Development and Support (ROADS)
 Email: ethicsoffice@mcmaster.ca

If you would like to participate in the interview, please ensure you meet the eligibility criteria listed above, and email Jocelyn with your preference for scheduling a 30-45 minute video call.

We will send you a one-time follow-up reminder email in 1 week to see if you would like to participate.

Many thanks, in advance, for your time and consideration.

{Your name}
 {Your organization}

Reminder Email Recruitment Script Sent on Behalf of the Researcher By the Holder of
 the Participant's Contact Information

Email subject line: Reminder - McMaster Study - Videoconferencing for lifelong learners during the pandemic

Email body:

Dear {your students/users/etc.},

I hope this email finds you well.

I am following up with you in regards to the study participant opportunity we had emailed you about on {DATE}. Jocelyn Badali, a McMaster student, who is running this study would greatly appreciate your input and support in helping her to improve lifelong learning programs and courses for the future of continuing education for older adults. Your help is needed by participating in an online interview that will take approximately 30-45 minutes.

If you are interested in getting more information about taking part in Jocelyn's study, please read the brief description from the previously sent email (found below) and **contact Jocelyn directly** by using her McMaster email address badalij@mcmaster.ca or phone number 647-987-3305

We have attached here again the Letter of Information / Consent for this study that gives you full details about the research.

Many thanks, in advance, for your time and consideration.

{your organization}

Appendix B

Letter of Information / Consent

DATE: March 5, 2021

LETTER OF INFORMATION / CONSENT

The Use of Web-based Videoconferencing for Lifelong Learners During the Coronavirus disease Pandemic

Principal/Student Investigator:

Jocelyn Badali
Department of Health, Aging & Society
McMaster University, Hamilton ON CANADA
(647) 987-3305
badalij@mcmaster.ca

Supervisor:

Dr. Michel Grignon
Department of Health, Aging & Society
McMaster University, Hamilton ON CANADA
grignon@mcmaster.ca

Purpose of the Study:

1. I am doing this research as a requirement to complete my Master of Arts thesis within the Department of Health, Aging and Society at McMaster University.
2. The purpose of this study is to investigate how older adults, who pursue lifelong learning in-person, have interpreted their transition to online learning because of COVID-19 pandemic meeting restrictions.

Participants are invited to take part in this study on online lifelong learning to find out how COVID-19 has changed older adults' experiences with continuing education. Understanding the opinions and perceptions of lifelong learners participating in online programs within this global pandemic will help enhance the future delivery of these programs for older adults.

I am interested in speaking with older adult participants who:

- are transitioning from in-person group learning or facilitation,
- OR have recently dropped out of lifelong learning activities,
- OR are brand new to lifelong learning

You will only be **eligible** to participate in this study if you:

- are a 50+ older adult
- are pursuing/have pursued continuing education/lifelong learning

- have access to internet and device (i.e. laptop, smartphone or tablet). Participants without access to internet and device may be allowed to participate using alternate interview methods, i.e. phone.
- are English-speaking

What will happen during the study?

- I, Jocelyn Badali (the Principal Investigator student), will meet with you, the participant, privately via Zoom videoconferencing to have a guided conversation on your experiences with lifelong learning. The virtual Zoom meeting room will be password protected, and only you and I will be able to access the “room”.
- I will review the privacy and confidentiality information with you before we begin our interview questions.
- If at any time you wish to retract your participation in this study, please inform me either during our interview, or by phone or email (my contact information is above). You can choose to withdraw your participation before, during or after the interview.
- During the interview, I will be typing notes and recording our conversation, with your permission.
- Following the interview, at a later date, and if you consent, I will also provide you with a summary of our conversation. This summary can be reviewed by you, if you wish, so that you can make changes to any of the responses you may have made during the interview. This summary of information will be provided via a private correspondence and in a secure manner. You will not be personally identifiable in this written summary.
- The interview via Zoom will take approximately 30-45 minutes to complete.
- We will only meet one (1) time to conduct an interview via Zoom.
- You will conduct your interview alone, and only I will be present during the interview.
- As the interview will be conducted via Zoom, you may participate at home, or wherever you feel comfortable and secure.
- During our scheduled meeting time, and following our discussion of this Letter of Information / Consent, I will ask you some demographic and background questions like your age and marital status.
- If at any time you are uncomfortable (anxious, uneasy, etc.) responding to any of the questions, you can tell me you would like to skip/pass that question. I may ask you if I can return to that question later on during our interview.
- During the interview, I will begin with introductory questions. Then I will ask you some questions, with respect to the study, that may include:
 - What is your educational background?
 - What is your experience with technology?
 - What have your learning experiences been like with respect to the COVID-19 pandemic restrictions?

Are there any risks to doing this study?

- There are minor psychological risks associated with your participation in this study. The only psychological risks identified with your participation would be if you are nervous, embarrassed or unwilling to share information about your personal educational and technology experiences. During our interview, we will ensure that the time we spend in conversation together is free from stigma and judgement. If our interview reveals that you may be seeking mental health supports, I will provide you with a list of mental health resources, or a summarized copy based on your geographical location.
- There are minor social risks associated with your participation in this study. This study will use the Zoom video calling platform to collect data, which is an externally hosted cloud-based service. Please note that while this service is approved for collecting data in this study by the McMaster Research Ethics Board, there is a small risk with any platform, such as this, of data that is collected on external servers falling outside the control of the researcher. The interview will also be transcribed by Otter AI, a transcription service in partnership with Zoom. Please see Otter AI's privacy policy for more information: <https://otter.ai/privacy>. I will make all information about security and privacy known to you before we begin our interview. I will explain to you the levels of confidentiality and privacy I will be practicing to keep your information secure and private. If you are concerned about this, I will make alternative arrangements for us to talk, via telephone.

Are there any benefits to doing this study?

- Possible benefits to you, the participant:
 - This interview process may bring to light some of your own learning goals or ambitions within lifelong learning that you may not have considered previously or thought intentionally about. The interview will give you a chance to explore your opinions on why you pursue lifelong learning and why you believe it benefits you in your successful and healthy aging journey.
- Possible benefits to the community:
 - The implications of this research are that the potential results from the study may be used to inform the development of new lifelong learning programs for older adults. The results of this study may also help in the evaluation and improvement of existing lifelong learning organizational structures.
- There is a possibility that participants may not benefit from participating in the study.

Who will know what I said or did in the study?

- You are participating in this study confidentially. I will not use your name, or any information that would allow you to be identified, in the written or orally presented research dissemination. No one but me will know whether you were in the study unless you choose to tell them.

- I will keep your information confidential by encrypting and password protecting any files that are associated with your interview recordings or written text summarizing the conversation.
- There will be a secure file that creates a code to be associated with your interview. Only your name, and contact information will be in this file and the code created for your name/contact information will be used to code the audio/video recording and summarized texts and written notes. This file containing your name and contact details will be password protected and encrypted, and stored on my computer to which only I have access. I only collect name and contact information for administrative purposes.
- Only I, as Principal Investigator, will have access to any of the recording, contact details, email correspondences and subsequent written notes.
- I will be retaining the documents and recordings associated with this study for one (1) year from the time of study completion, as I intend to complete my master's thesis work prior to the end of 2021.
- I will be permanently deleting all information, documents and emails with identifying participant information following the one (1) year mark.
- It is important to note that every effort will be made to protect your confidentiality and privacy, as I will not use your name or any information that would allow you to be identified. However, we are often identifiable through the stories we tell. Please keep this in mind in deciding what you share during the interview. If at any time you wish to revisit a response you provided during the interview, you may do so during our meeting time. With your consent, I can also provide you with a summary of our conversation which you may review after our interview. If there is any information or comments you made in the interview that may identify you, you can inform me of this and adapt or retract a response you provided in the interview.

What if I change my mind about being in the study?

- Your participation in this study is voluntary. If you decide you would no longer like to be a part of this study, for whatever reason, you can stop (withdraw) from the interview before May 1, 2021, even after consenting.
- If you decide to withdraw, there will be no consequences to you. In cases of withdrawal, any data you have provided will be destroyed unless you indicate otherwise. If you do not want to answer some of the questions you do not have to, but you can still be in the study.

How do I find out what was learned in this study?

- I expect to have this study completed by approximately *July 2021*.
- A summary of the results (only including de-identified, anonymized information) will be provided to all participants at this time.

Questions about the Study:

- If you have questions or need more information about the study itself, please contact me at:
 - Email: badalij@mcmaster.ca

- Phone: (647) 987-3305

This study has been reviewed by the McMaster University Research Ethics Board and received ethics clearance. If you have concerns or questions about your rights as a participant or about the way the study is conducted, please contact:

**McMaster Research Ethics Secretariat
Telephone: (905) 525-9140 ext. 23142
C/o Research Office for Administrative Development and Support
E-mail: ethicsoffice@mcmaster.ca**

Before the interview begins, you will be asked to respond to the following oral consent questions. No information that will personally identify you will be recorded.

ORAL CONSENT

Researcher asks participant preliminary questions:

- **Have you read the information presented in the information letter about a study being conducted by *Jocelyn Badali* of McMaster University?**
- **Have had the opportunity to ask questions about your involvement in this study and received additional details, as requested?**
- **Do you understand that if you agree to participate in this study, you may withdraw from the study at any time before May 1, 2021?**
- **Have you been given a copy of the Letter of Information / Consent?**

[If response is yes, to all of the above, consent is recorded on researcher's Log for Recording Verbal Consent.]

[If response is no, participant will be provided with additional information or time to review the details listed above.]

Research asks participant about willingness to participate:

- **Do you agree to participate in the study?**

[If response is yes, consent is recorded on researcher's Log for Recording Verbal Consent.]

[If response is no, participant will be thanked for their time and consideration.]

Researcher asks Participant: Do you agree to audio recording and transcription of this interview?

[If response is yes, consent is recorded on researcher's Log for Recording Verbal Consent.]

[If response is no, this will be recorded in the Log for Recording Verbal Consent. Interview will proceed without audio recording. Participant information will therefore not be transcribed. Notes may be hand-written/typed by researcher, but interview will not be used in qualitative analysis.]

Researcher asks Participant: Do you agree to video recording of this interview?

[If response is yes, consent is recorded on researcher's Log for Recording Verbal Consent.]

[If response is no, this will be recorded in the Log for Recording Verbal Consent. Interview will proceed without video recording. Cameras of both participant and interviewer will be turned off.]

Researcher to Participant: Would you like a copy of the transcription/summarized text of the interview provided to you?

[If response is yes, consent is recorded on researcher's Log for Recording Verbal Consent.]

[If response is no, this is recorded on the researcher's Log for Recording Verbal Consent.]

Researcher to Participant: Would you like to receive the dissemination of the final results of this project via email?

[If response is yes, consent is recorded on researcher's Log for Recording Verbal Consent and interview will begin. *Researcher will begin recording the Zoom meeting.*]

[If response is no, this is recorded on the researcher's Log for Recording Verbal consent and interview will begin.]

Appendix C

Snowball Email Recruitment Script

Snowball Email recruitment script

J Badali, BHA

Masters Candidate in Health and Aging

**The Use of Web-based Videoconferencing for Lifelong Learners During the
Coronavirus disease Pandemic**

Email subject line: McMaster Study - Videoconferencing for lifelong learners during the pandemic

Email body:

Dear xxxxx,

I hope this email finds you well. Would you be willing to pass along my name and contact information, and the following short description of my study (including the attached Letter of Information / Consent), to people you know who may be interested in participating?

There is no obligation for you to pass along this information, and there will be no penalty if you do not provide this information.

The following bolded text would need to be pasted into your email correspondence:

Description of study: I am inviting you to participate in a study aimed to improve lifelong learning programs and courses for the future of continuing education for older adults. Your help is needed by participating in an online interview that will take approximately 30-45 minutes.

You will only be eligible for the study if you:

- **are transitioning from in-person group learning or facilitation,**
- **OR have recently dropped out of lifelong learning activities,**
- **OR are brand new to lifelong learning**
- **are 50 years of age or older**
- **have access to internet and device for videoconferencing (participants without access to internet and/or device, and wish to participate may be able to participate using alternate interview methods)**
- **English-speaking**

Attached here you will find the Letter of Information / Consent for this study that gives you full details about the research, confidentiality and privacy information, and the McMaster University ethics board information, who have approved this study.

If you would like to participate in the interview, please ensure you meet the eligibility criteria listed above, and email Jocelyn Badali (badalij@mcmaster.ca) with your preference for scheduling a 30-45 minute video call.

Please let me know if you could help me with this, as it would be greatly appreciated. You will also need to **attach** the Letter of Information / Consent to the email you send out to any interested participants.

Many thanks, in advance, for your time and consideration, and please let me know if you have any questions.

Jocelyn

Appendix D

Email Recruitment Script (and Reminder) Sent Directly to Participants

Email subject line: McMaster Study - Videoconferencing for lifelong learners during the pandemic

Email body:

Dear xxxxx,

I hope this email finds you well.

I am inviting you to help me improve lifelong learning programs and courses for the future of continuing education for older adults. Your help is needed by participating in an online interview that will take approximately 30-45 minutes.

As a part of the graduate program in Health and Aging at McMaster University, I am carrying out a study to learn more about lifelong learners' experiences during the pandemic. I am interested in learning from you about the experiences you have had transitioning to online learning formats, or withholding your class enrolment, and how the pandemic has impacted your continuing education goals. I am interested in speaking with participants who:

- are transitioning from in-person group learning or facilitation,
- OR have recently dropped out of lifelong learning activities,
- OR are brand new to lifelong learning

You will only be **eligible** for this study if you:

- are 50 years of age or older
- are pursuing/have pursued continuing education/lifelong learning
- have access to internet and device for videoconferencing (participants without access to internet and/or device, and wish to participate may be able to participate using alternate interview methods)
- are English-speaking

Attached here you will find the **Letter of Information / Consent** for this study that gives you full details about the research. If you agree to participate in the interview, we will go over the Letter of Information / Consent together, in addition to confidentiality information pertinent to your participation at the time of the interview.

As the interview will be conducted via Zoom and recorded, the possibility of risk must be brought to your attention. The study will use the Zoom videoconferencing platform to collect data which is an externally hosted cloud-based service. Please note that whilst this service is approved for collecting data in this study by McMaster Research Ethics Board, there is still a small risk with any platform such as this of data that is collected on external servers falling outside the control of the researcher. I will make every effort to contain and protect the interview files from external audiences, and all of the participant

information you provide, in addition to administrative information such as your name and email address will be de-identified and not released within the final research outcomes. If you are concerned about this, I am happy to make alternative arrangements for you to participate.

If at any time after you have agreed to participate in this research, you can notify me if you would like to discontinue your participation or be completely excluded from the study. Your interview responses may be withdrawn after the interview, up until May 1, 2021.

The study has been reviewed and cleared by the McMaster Research Ethics Board. If you have any concerns or questions about your rights as a participant or about the way the study is being conducted you can contact:

The McMaster Research Ethics Board Secretariat
Telephone: (905) 525-9140 x. 23142
% Research Office for Administration, Development and Support (ROADS)
Email: ethicsoffice@mcmaster.ca

If you would like to participate in the interview, please ensure you meet the eligibility criteria listed above, and email me back with your preference for scheduling a 30-45 minute video call.

After 1 week, if I have not yet heard back from you, I will send you a one-time follow-up reminder email to see if you would like to participate, or I can help answer any questions you may have about the study.

Many thanks, in advance, for your time and consideration.

Jocelyn Badali BHA,
Masters Candidate in Health and Aging
Department of Health, Aging & Society
FACULTY OF SOCIAL SCIENCES
McMaster University, Hamilton Ontario
Tel: 647-987-3305
badalij@mcmaster.ca

Reminder Email Recruitment Script Sent Directly to Participants

Email subject line: Response requested - McMaster Study - Videoconferencing for lifelong learners during the pandemic

Email body:

Dear xxxxx,

I hope this email finds you well.

I am following up with you in regards to my project I had emailed you about on {DATE}. I would greatly appreciate your input and support in helping me improve lifelong learning programs and courses for the future of continuing education for older adults. Your help is needed by participating in an online interview that will take approximately 30-45 minutes.

I am interested in learning from you about the experiences you have had transitioning to online learning formats, or withholding your class enrolment, and how the pandemic has impacted your continuing education goals. I am interested in speaking with participants who:

- are transitioning from in-person group learning or facilitation,
- OR have recently dropped out of lifelong learning activities,
- OR are brand new to lifelong learning

You will only be **eligible** for this study if you:

- are 50 years of age or older
- are pursuing/have pursued continuing education/lifelong learning
- have access to internet and device for videoconferencing (participants without access to internet and/or device, and wish to participate may be able to participate using alternate interview methods)
- are English-speaking

I have attached here again the **Letter of Information / Consent** for this study that gives you full details about the research. If you agree to participate in the interview, we will go over the Letter of Information / Consent together, in addition to confidentiality information pertinent to your participation at the time of the interview.

If you would like to participate in the interview, please ensure you meet the eligibility criteria listed above, and email me back with your preference for scheduling a 30-45 minute video call.

Please let me know if I can help answer any questions you may have about the study.

Many thanks, in advance, for your time and consideration.

Jocelyn Badali BHA,
Masters Candidate in Health and Aging
Department of Health, Aging & Society
FACULTY OF SOCIAL SCIENCES
McMaster University, Hamilton Ontario
Tel: 647-987-3305
badalij@mcmaster.ca

Appendix E

Interview Guide

LIFELONG LEARNER INTERVIEW GUIDE: YOUR TRANSITION TO ONLINE LEARNING

The Use of Web-based Videoconferencing for Lifelong Learners During the Coronavirus disease Pandemic

*Adapted from McMaster's Research Innovation templates:
[https://research.mcmaster.ca/support-for-researchers/forms-
templates/page/2/?ofc=Research%20Ethics](https://research.mcmaster.ca/support-for-researchers/forms-templates/page/2/?ofc=Research%20Ethics)*

Researcher: Jocelyn Badali

**NOTE: TEXT WRITTEN IN ITALICIZED BOLD CAPITAL LETTERS CONSTITUTES
ADDITIONAL REMINDERS MEANT TO GUIDE THE INTERVIEWER ONLY.**

**[THE COMPLETION OF THE INTRODUCTORY SECTION OF THE
INTERVIEW SHOULD TAKE APPROXIMATELY 5-10 MINUTES]**

**1) INTRODUCTION AND INSTRUCTIONS (WITH UNDERSTANDING THAT
PRELIMINARY CONTACT AND MEETING COORDINATION WAS DONE
VIA EMAIL):** Hello, my name is Jocelyn. Thank you for agreeing to participate in this research interview for the project “The Use of Web-based Videoconferencing for Lifelong Learners During the Coronavirus Disease Pandemic”. Our conversation will help inform my research about experiences with lifelong learning throughout the COVID-19 pandemic lockdown, meeting restrictions, and physical distancing policies.

Lifelong learning, as we will address it throughout this research and in this interview, is defined as continued education, whether it be through formal, university or college affiliated courses, or informal classes, lectures or meetings, offered through community centres, programmes or informal groups of likeminded individuals. Lifelong learners, in this project for this research, will be categorized as older adults, sometimes retired and in pursuit of continued education. Lifelong learners pursue lifelong learning for many reasons: it may be a part of their retirement plans; they have an interest in making a career change; they are seeking meaning and reward; or they may wish to remain healthy and productive (i.e. delay cognitive decline and increase autonomy).

Lifelong learning amongst older adults has become a more popularized area of continuing education and particular attention must be made for this expanding group.

Some examples of lifelong learning may be a retired individual is interested in learning a new skill, such as becoming fluent in French. They may pursue lifelong learning through a smart phone app like Duolingo, or they may enrol in the school district adult learning

courses for French, offered at a local community centre, where they go in once a week to participate in a classroom setting with other adult learners and a teacher.

Another example of lifelong learning may be in the case of an older adult who is interested in learning more about what is happening in the global economy of trade. The older adult may sign up for lectures offered online via video, or a lecture that is being presented live, on stage in a lecture hall at their local university by an expert facilitator and speaker.

PAUSE FOR QUESTIONS – ASK INTERVIEWEE IF THEY HAVE ANY QUESTIONS

What is a research interview? An interview is a conversation directed by an interviewer for the purpose of gathering specific information. From a research perspective, interviews are a part of the survey methodology, and are used to collect data about the opinions, attitudes or reactions of the members of a sample population.

Before we get into some questions to become better acquainted with one another, we will first walk through a revised copy of the consent section of the Letter of information, together now.

[FOR INTERVIEWER: REVIEW ORAL CONSENT SCRIPT AND ANSWER ANY QUESTIONS ABOUT IT. COLLECT ORAL CONSENT. ENSURE THAT THE PARTICIPANT STILL HAS A COPY OF THE LETTER OF INFORMATION / CONSENT TO KEEP. ONCE COMPLETED, PROCEED TO SECTION 2) INTERVIEW.]

2) INTERVIEW:

a. We will start with some basic demographic information:

How would you describe your gender?

What age category do you fall within?

BETWEEN 50 - 60

BETWEEN 60 - 70

BETWEEN 70 - 80

BETWEEN 80 - 90

90 +

How would you describe your marital or relationship status?

SINGLE

LEGALLY MARRIED

A COMMON-LAW SPOUSE

WIDOWED/PARTNER DECEASED SEPARATED

DIVORCED

PREFER NOT TO ANSWER

What is your educational background?

DID NOT GRADUATE FROM HIGH SCHOOL

HIGH SCHOOL

UNDERGRADUATE DEGREE

GRADUATE STUDIES

PROFESSIONAL DEGREE - MEDICAL SCHOOL, TEACHERS COLLEGE,

LAW SCHOOL ETC.

NON UNIVERSITY POST-SECONDARY EDUCATION (COLLEGE, AND/OR TRADE SCHOOLS, ETC.)

PREFER NOT TO ANSWER

b.) Now we will have a more open-ended conversation. Please respond to these questions with a first-thought mentality. I would just like to get to know you opinions and thoughts on these topics, and what they mean to you. These questions also act as a warm-up so that we get used to conversing with each other naturally.

What do you do in a day?

What does technology mean to you?

What does education mean to you?

What do you think of education that is specific for older adults? **[PROMPTS: SHOULD EDUCATION FOR OLDER ADULTS BE A SEPARATE PROGRAM FROM OTHER AGE GROUPS? IS IT IMPORTANT? WHY OR WHY NOT? WHAT IS YOUR OPINION ON EDUCATION FOR OLDER ADULTS OR FOR ANY OTHER AGE GROUP?]**

Why do you believe older adults participate in lifelong learning?

What are some benefits to lifelong learning, whether you have participated in “learning” as an older adult or not?

What do you believe may be some negative attributes of lifelong learning, or participating in lifelong learning as an older adult? **[PROMPTS: IS IT AGEIST TO SEPARATE OLDER ADULTS FROM OTHER ADULTS IN THE CLASSROOM? ARE OLDER ADULT LEARNING CLASSES/COURSES/ACTIVITIES NOT REFLEXIVE OF OLDER ADULT’S LEARNING NEEDS?]**

What are some of your experiences with taking classes/participating in learning activities at this stage in your life?

Are you currently enrolled in/have you previously participated in any lifelong learning or continuing education courses or activities?

**IF PARTICIPANT IS CURRENTLY INVOLVED IN
(PARTICIPATING/ENROLLED IN)
COURSE(S):**

Please explain how you are participating in this course or educational activity.
[**FORMAT PROMPTS: ARE YOU TAKING A COURSE ONLINE, ARE YOU GOING IN-PERSON TO TAKE A CLASS OR ACTIVITY, ARE YOU WATCHING LECTURES OR READING AT HOME, ETC.**]

Has the pandemic restricted your participation in lifelong learning in anyway?

What are some new challenges you may have encountered in your learning process as a result of COVID-19, if any?

Are you taking any courses online/participating in any learning activities? If so, what are some of your experiences with taking an online course or class?

- What challenges have you experienced with online courses?
- What are some benefits of online courses?
- Have you participated in online courses before the COVID-19 pandemic meeting restrictions?
- If this was your first time participating in online learning, would you participate/enrol in an online format again?
- What is the format of your online learning? [**PROMPTS: IS THE LEARNING SYNCHRONOUS (LECTURES DELIVERED AS USUAL, IN REAL TIME, BUT VIRTUALLY) OR ASYNCHRONOUS (WATCHING LECTURES/MODULES AT YOUR OWN TIME, CHATTING IN GROUPS/ONLINE FORUMS) OR A MIX OF BOTH?**]

If you are participating in an online course, what are some challenges you may have encountered with enrolment/getting your learning activities set up?

If you are taking an online course, what has the difference been between previous in-person classes you may have taken and online classes that you are enrolled in now?

[CHALLENGE PROMPTS: DIFFICULTY ACCESSING PLATFORM, SPEAKING WITH FACILITATOR, CONVERSING WITH CLASSMATES, TIME, FORMAT, COST]

[BENEFIT PROMPTS: FLEXIBILITY, SAFETY, ACCESSIBILITY, CONSISTENCY, COURSE OFFERINGS, ACCESS TO NEW FACILITATORS AND CLASSMATES]

IF PARTICIPANT IS <u>NOT</u> CURRENTLY INVOLVED IN (PARTICIPATING/ENROLLED IN) COURSE(S):
When was the last time you participated/enrolled in a course/activity?
Why did you choose to take that course/activity?
Why did you decide not to participate in another course/activity, now or at that time?
Have you ever participated in an online course or learning activity?
<p>If you have participated in an online course or learning activity in the past, what are some of your experiences?</p> <ul style="list-style-type: none"> - What challenges have you experienced with online courses or activities? - What are some benefits of online courses? - Would you participate in them again? <p>[CHALLENGE PROMPTS: DIFFICULTY ACCESSING PLATFORM, SPEAKING WITH FACILITATOR, CONVERSING WITH CLASSMATES, TIME, FORMAT, COST]</p> <p>[BENEFIT PROMPTS: FLEXIBILITY, SAFETY, ACCESSIBILITY, CONSISTENCY, COURSE OFFERINGS, ACCESS TO NEW FACILITATORS AND CLASSMATES]</p>
If you have participated in an online course, what were some challenges you may have encountered with enrolment/getting your learning activities set up?

3) WRAP-UP:

Thank you so much for your meaningful participation today - if, for any reason, at any time, you need to contact me with regards to your responses, or questions about your participation in the study, please contact me via email badalij@mcmaster.ca or by phone 647-987-3305 if necessary

Appendix F

Oral Consent Script

The Use of Web-based Videoconferencing for Lifelong Learners During the Coronavirus disease Pandemic

Oral Consent Script

NOTE: TEXT WRITTEN IN ITALICIZED BOLD CAPITAL LETTERS CONSTITUTES ADDITIONAL REMINDERS MEANT TO GUIDE THE INTERVIEWER ONLY.

For the researcher: This script is to be used in conjunction with the Interview Guide, when obtaining oral consent from participants. Consent and details will be recorded and logged in Oral Consent for Researcher. The participant will have already received a copy of Letter of Information / Consent for their review.

Only use this script once you have reached the appropriate section of the Interview Guide, where it is indicated to begin reading from this Appendix, to obtain consent.

Have you had time to read the Letter of Information / Consent that I sent you?

[If the LOI was provided in advance and the participant responds that they have read the LOI]

Great, then I would like to take a moment to review some main points from the Letter of Information before we continue.

Confidentiality: [READ ALOUD] Before we begin our discussion and before you consent to participating, let's spend a few moments talking about confidentiality and go over some rules that will guide our conversation:

- Your views are welcomed and important.
- The information I collect today will be de-identified from you as an individual. This means we will not include your name, location, affiliations or any other identifying information that would make you recognizable.
- Any quotes that are obtained from this interview will not be associated with you personally. However, there always remains a risk that you will be identified by someone if they know you participated in this study, and could identify you based on your views or opinions.
- This being said, I ask that you only make those comments that you would be comfortable making in a public setting; and to hold back making comments that you would not say publicly.

- If you would like to stop being interviewed at any time, you may indicate so and we will stop the recorded conversation. You can skip over any questions if you don't feel comfortable answering them.
- You can expect this discussion to last approximately 30-45 minutes.
- Your participation in this study is voluntary. If you decide you would no longer like to be a part of this study, for whatever reason, you can stop (withdraw) from the interview before May 1, 2021, even after providing consent. There will be no consequences to you for withdrawing.
- If you ever have any questions about the ethical clearance of this study, you may contact the McMaster University Research Ethics Board. Their contact information is in the provided Letter of Information / Consent.

Use of recording technology:

- This conversation will be recorded to increase accuracy of data collection and reduce the chance of misinterpretation.
- All recordings and transcriptions will be kept under password protected security measures by me, the researcher.
- Please note that Zoom, the platform we are using for this recorded interview, is in partnership with Otter AI to perform its automated transcription services. If you have any concerns about the privacy of Otter AI, as was stipulated in the Letter of Information and Consent, it can be reviewed at the following web link:
<https://otter.ai/privacy>
- Names will be removed from transcripts. Participants will have coded numbers attached to their name which only I will know.
- Again, only I will have access to documents that have your personal name and information associated with them.
- The videos and audio recordings will not be used in any presentation formats, or shared with any other individuals. The recordings are solely made to help me transcribe, categorize and analyze your responses into meaningful data.

I will now record the date and your participant code in my oral consent log.

Now I will begin obtaining consent from you. These questions are in the Letter of Information / Consent.

Researcher asks participant preliminary questions:

- Have you been given a copy of the Letter of Information / Consent?
- Have you read the information presented in the information letter about a study being conducted by me, Jocelyn Badali of McMaster University?
- Have you had the opportunity to ask questions about your involvement in this study and received additional details, as requested?
- Do you understand that if you agree to participate in this study, you may withdraw from the study at any time before May 1, 2021?

[If response is yes, to all of the above, consent is recorded on researcher's Log for Recording Verbal Consent.]

[If response is no, participant will be provided with additional information or time to review the details listed above.]

Research asks participant about willingness to participate:

- Do you agree to participate in the study?

[If response is yes, consent is recorded on researcher's Log for Recording Verbal Consent.]

[If response is no, participant will be thanked for their time and consideration.]

Researcher asks Participant: Do you agree to audio recording and transcription of this interview?

[If response is yes, consent is recorded on researcher's Log for Recording Verbal Consent.]

[If response is no, this will be recorded in the Log for Recording Verbal Consent. Interview will proceed without audio recording. Participant information will therefore not be transcribed. Notes may be hand-written/typed by researcher, but interview will not be used in qualitative analysis.]

Researcher asks Participant: Do you agree to video recording of this interview?

[If response is yes, consent is recorded on researcher's Log for Recording Verbal Consent.]

[If response is no, this will be recorded in the Log for Recording Verbal Consent. Interview will proceed without video recording. Video must be turned off for both interviewer and interviewee.]

Researcher to Participant: Would you like a copy of the transcription/summarized text of the interview provided to you?

[If response is yes, consent is recorded on researcher's Log for Recording Verbal Consent.]

[If response is no, this is recorded on the researcher's Log for Recording Verbal Consent.]

Researcher to Participant: Would you like to receive the dissemination of the final results of this project via email?

[If response is yes, consent is recorded on researcher's Log for Recording Verbal Consent and interview will begin. **Researcher will begin recording the Zoom meeting.]**

[If response is no, this is recorded on the researcher's Log for Recording Verbal consent and interview will begin.]

Confirm the following to the participant:

Do you have any questions or want me to go over any study details again?

Respond to any questions and then proceed to section 2 of the Interview guide.

Appendix H

Abstract from Ethics Approval Application

The following items within this appendix item outline details required for ethics approval from the McMaster Research Ethics Board.

Obtaining Consent

To conduct the interviews and collect data, oral consent was obtained prior to the question and answer period. There were no individuals who lacked the capacity, in the context of this study, to make an informed choice to participate in the research (e.g. children, people with cognitive impairments), so informed consent was obtained from each participant verbally. The Oral Consent Script was used to review the confidentiality and security measures of the study, in addition to reviewing how the Zoom transcription, audio and video recording functions operate.

An Oral Consent Log (Appendix G) was used to capture responses to the following questions:

1. Responses to preliminary participant questions:
 - Have you been given a copy of the Letter of Information / Consent?
 - Have you read the information presented in the information letter about a study being conducted by me, Jocelyn Badali of McMaster University?
 - Have you had the opportunity to ask questions about your involvement in this study and received additional details, as requested?
 - Do you understand that if you agree to participate in this study, you may withdraw from the study at any time before May 1, 2021?
1. Do you agree to participate in the study?
2. Do you agree to audio recording and transcription of this interview?
3. Do you agree to video recording of this interview?
4. Would you like a copy of the transcription/summarized text of the interview provided to you?
5. Would you like to receive the dissemination of the final results of this project via email?

Privacy and Confidentiality

To ensure the privacy and confidentiality of the interview participants was maintained, codes were created to link participants to their interview data. A document that identifies the participant by name and the code associated to them used the following information:

an identifier to refer to the participants category (i.e. transitioning student from in-person to online [T], dropout student [D], new student [N],
 an identifier to refer to the participant's gender, [M] or [F],
 an identifier to refer to the participant's age, i.e. [75].

An example of a code would be: TM75 for a male, aged 75 year old in the Transitioner group.

It was necessary to ask the age of the participant as lifelong learning is generally geared towards older adults who are 50 years or older. During the interviews, participants were asked to state their age so that the participants in this study accurately reflect the population of lifelong learners. Participants, however, would not have been disqualified from participation if they were younger than 50 in certain instances. The identifying variables that were also captured in this study included gender and the participant's program or area of study. It will be important to accurately reflect the participants who are active in online lifelong learning based on gender, as typical lifelong learning programs enrol more female students. It is equally important to speak to the participant's study and learning interests and ask them what courses they are enrolled in, or have previously enrolled in. This is crucial to interpreting their opinions about online learning during the COVID-19 pandemic.

To maintain confidentiality of the participants, this document of identifying names linked to the codes was saved separately from the participant responses, in a separate, password-protected spreadsheet, on the password-protected computer. Only I had access to this coding sheet. Email addresses and, for certain participants, phone numbers were also collected in order for me to schedule interviews with each participant.

Email addresses were also required for those participants who responded to wanting to participate in respondent validation. They were provided with the option to review their answers (edited transcriptions) and provide any changes to comments they may have made during the interview. So as not to burden participants, respondent validation was not mandatory. Additionally, contact information was required from those participants who responded to wanting to receive the final dissemination of results.

Accessibility

Due to the nature of online, virtual interviews, they can take place in any physical location so long as the participant has access to the internet and a device. Participants were free to choose the location where they wanted to participate in the interview. Because of COVID-19 lockdown restrictions, most participants are confined to their homes.

A supplemental Zoom guide for participants who were new Zoom users was created. If participants required additional support, the guide uses images and instructions on how to access zoom (see Appendix I). I made myself available to instruct the participant on how to use Zoom and made changes to how the interview was conducted based on the participants request, i.e. no video turned on for participants who requested this.

Safety and Risks

The potential psychological risks from this study were considered minor and unlikely. There was a chance that speaking to their educational background or goals in successful aging may have led some interviewees to feel embarrassed or worried that they are not striving for a goal that would be within their socio-cultural boundaries. There was also a potential for participants to feel frustrated/concerned/depressed/anxious if their learning has been interrupted by the pandemic. This may be a particularly difficult situation for those who have stopped their learning activities altogether, because of the pandemic.

Participants were informed of the safe and private circumstances that the interviews were being conducted. If at any time they felt embarrassed to respond to questions asked during the interview, I mitigated the question and moved on to another question. I informed the interviewees at the beginning and throughout the interview, if necessary, that they do not need to respond to a question if they are uncomfortable. For those participants who were struggling with the afflictions of the pandemic, and wanted more support, an individualized list of resources could be prepared, based on their geography. A list of Canada-wide resources and support services is found in Appendix J.

This study used the Zoom video calling platform to collect data, which is an externally hosted cloud-based service, using my McMaster license for Zoom. Using the McMaster campus-wide license, and using my private log-in information, adds a layer of security, compared to an individual, free account available to the public. There is a small risk, with any platform such as this, of data that is collected on external servers falling outside the control of the researcher. These risks associated with privacy through Zoom were made known to the participants within the recruitment documents, the consent forms and the interview portion where these details of interview confidentiality were explained. To help eliminate minor social risk of using Zoom and privacy concerns, the waiting room feature on Zoom was enabled. Participants received a password to access the interview Zoom link, and I only permitted entrance to the virtual Zoom room based on authorized entry. No other participants or researchers had access to this interview link, therefore only the participant and myself would be on the call. If participants were concerned about this in any correspondence with me when arranging the interview time, alternative arrangements could have been made for them to participate via telephone.

Audio and video recordings

Audio recording of participants was necessary in order to capture transcriptions of the participants' comments and responses to be used in qualitative data analysis. The interviews were conducted via Zoom videoconferencing, as face-to-face interviews are highly restricted due to COVID-19 physical distancing and meeting restrictions. Non-verbal communication is an important factor in understanding the thoughts and opinions of participants and building a safe connection where participants can speak face-to-face with the interviewer is essential.

Zoom recording options (including transcription, recorded audio and video options) provide the user with the choice of saving recorded video calls to the cloud or to the local computer. To mitigate risk that the videos may be accessed by Zoom, all recordings and transcriptions that were saved to my cloud Zoom account were immediately downloaded to a private, password-protected computer, and then deleted permanently from the Zoom account. Enabling the settings in the pre-scheduled interviews allowed for the interview recordings to be saved to the private McMaster Zoom account's cloud. This is the appropriate method for attaining transcribed recordings of video meetings. Every measure was taken to ensure that the recordings with transcription were immediately downloaded to the local computer's password-protected desktop folders, and then immediately deleted from the Zoom account, as soon as they became available. An automated message is emailed to Zoom users once a recording is available in their cloud. This automated message does not identify which meeting recording (or any users, or information about the meeting) it is.

Information about the risks of data collection and video recording through Zoom were explained to the participant prior to obtaining their consent. Participants were provided with the opportunity to ask questions about the risks that were associated with their participation before the interview began. Participants were informed that Zoom uses Otter AI as its transcription service, which increases the risk that their responses could be transported externally to other audiences. This is clearly defined in the Letter of Information / Consent (Appendix B) and links to the Zoom privacy policies are provided within.

Storing Data

As aforementioned, research data is stored in password-protected files/folders that are then saved in a password-protected computer folder, only accessed by me. Due to COVID-19 physical distancing and campus closures, research was not conducted at McMaster University, but at my home. Therefore, transporting data and research materials from any locations was a nonissue. All research was conducted from one computer at my home. All videos and recordings/reports that were downloaded from the Zoom online platform were transferred securely and privately in the home office. No other witnesses saw or heard the interviews taking place, had permission to enter the interview meeting link, nor had access to view the videos/transcription reports as they were downloaded and saved to the password-protected files.

The transcription service offered by Zoom was utilized. Recordings of the interviews and the accompanying transcriptions were saved directly to the local computer, from the Zoom account's cloud. Immediate access to these files was obtained, so that they could be password-protected and saved to my personal computer. Any recordings and transcriptions were deleted from the Zoom account online, once they were securely saved to my password-protected computer. Again, only I had access to the raw, recorded and collected data. This collected data was carefully reviewed and edited by me to remove any personal identifiers of the participant such as names and locations.

Participants who wished to receive a copy of their transcription and/or a copy of our summarized session, for participant validation, would receive it from a password-protected file via email. The password for this file was sent in a separate email to the participant. When a participant had reviewed their transcription/summarized text, they would return this file to me via email. I had the password to reopen the password-protected file, and the email from the participant was deleted once the file had been securely saved back on the password-protected desktop folder. This step, in providing the transcription to participants, prior to it being uploaded for analysis in a qualitative analysis software program, also allows for an extra level of security, to ensure that all identifiable information had been removed. So as not to burden participants, respondent validation was not mandatory. All participants were also informed that all data collected from this study will be permanently deleted in 1 year time. This information was stated within the Letter of Information / Consent (Appendix B) and at the time of the interview.

The qualitative data analysis platform would be the final platform that would hold interview data from this project. The external, qualitative data analysis platform NVivo was used to create thematic categories from participant responses, necessary for analyzing the data and writing research results. As with Zoom, any external platform where data is being securely used will have inherent risk since the platform is not owned by the researcher. By ensuring the transcribed information and data that is uploaded to the NVivo site for analysis is free from identifiable information, there is greater security that the participants' privacy is retained. I reviewed and edited the transcriptions at a minimum of three times, to ensure no identifiable or indirect identifiable information was left within the document prior to uploading it to the NVivo platform.

Participants Right to Withdraw

In the initial recruitment correspondence, and all subsequent emails to schedule interviews with participants, they were made aware of the opportunity to withdraw before, during or after the data collection process. Participants were also provided with this context again prior to obtaining consent at the time of the interview. They were informed that they could stop the interview or their response to a question and verbally tell me that they wished to withdraw from the interview or project entirely. Following the completion of an interview, a participant had a right to withdraw from the entirety of the study at any time up until May 1, 2021, and could do so in both writing, through email correspondence, and verbally at the time of the scheduled interview. All of their data could be removed from the study, that had been obtained up until that point, up until May 1, 2021.

When a participant requested to withdraw from the study during the interview, I would have provided them with the option of having their data removed entirely from the study, or they may have the option of keeping the data that had been collected up until that point as a contribution to the study. If they wished to have the data removed entirely, I would inform them of how any associated data and emails of their participation in the study would be immediately deleted.

Participants were also informed that there were no consequences to them withdrawing from the study. Additionally, there were no incentives or reimbursements associated with this study that would have had to have been accounted for. There are no consequences to the participant for withdrawing their data. However, there would have been consequences to the study if there was a lack of data collected and an inability to complete a fulsome analysis. The May 1, 2021 deadline for participants eligibility to withdraw from the study was confirmed so that should many participants withdraw from the study, there would still be enough time for me to recruit additional participants to make this study feasible.

Appendix I

Supplemental Zoom Videoconferencing Guide for Participants

As a participant of the “The Use of Web-based Videoconferencing for Lifelong Learners During the Coronavirus Disease Pandemic”, you will be asked to join Jocelyn Badali, the principal investigator, in a videoconference on Zoom to conduct your interview.

What is Zoom?

Zoom is a computer program used to hold online virtual meetings. You can use Zoom on a smartphone, a tablet, a laptop, or a desktop computer (if you have a camera, speakers, and a microphone).

How to Download Zoom

This link, from the Society of Learning in Retirement: London, provides information on how to use *Zoom* for the first time: <https://srlondon.com/wp-content/uploads/2020/08/SLR-How-to-Use-Zoom-for-the-First-Time.pdf>

This link, from *Zoom*'s support page, provides a quick start guide for new users: <https://support.zoom.us/hc/en-us/articles/360034967471-Quick-start-guide-for-new-users>

If you require assistance downloading or setting up *Zoom* on your smartphone, tablet, laptop, or desktop computer, please contact me, **Jocelyn Badali** via email at badalij@mcmaster.ca and we can arrange a time to speak over the phone and set up *Zoom* on your device.

Helpful Tips

1. You can join a test *Zoom* meeting to familiarize yourself with the *Zoom* application and test your microphone/speakers before joining a *Zoom* meeting. Visit: <http://zoom.us/test>.
Once you have successfully tested joining a meeting, try joining a meeting with friends or family for more practice!
2. This *Zoom* meeting will be recorded for research purposes but will not be shared publicly. I will provide notice when the recording has begun (*Zoom* will also send notice that the session is being recorded).
3. For more helpful tips and tutorials, visit: <https://support.zoom.us/hc/en-us/articles/206618765-Zoom-Video-Tutorials>
4. If you connect to the Internet by Wi-Fi, try not to sit too far from the outer/modem. If you run into connection problems, and if it is possible, move closer to the router/modem or disconnect the wire from the modem and plug it directly into your laptop or desktop.

5. If technical problems persist, leave the meeting, and re-join it by re-clicking on the link that you received. If that does not work, reboot your computer or device.
6. You can call me, **Jocelyn Badali, at (647) 987 - 3305** if you require assistance logging in or would like to ask me any questions about how Zoom works.

Zoom Meeting Details - Tips for our interview

1. To join the meeting
 - CLICK the link that will be sent to you via email closer to the meeting date. Open the link at the time of our meetingOR....
 - JOIN the meeting via your *Zoom* application. CLICK Join a Meeting or Join and type in your meeting ID and passcode.



Photo: Screenshot of *Zoom* application when used on a computer

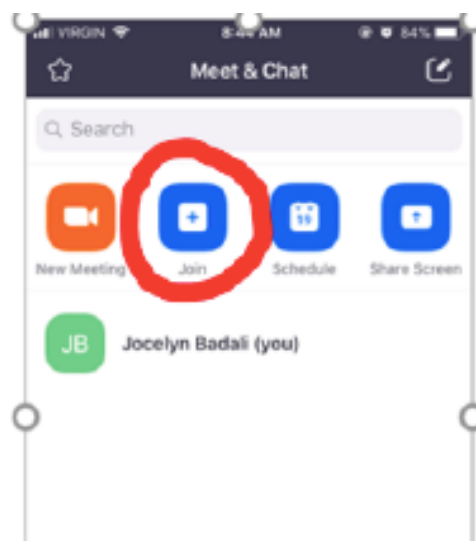


Photo: Screenshot of *Zoom* application when used on a smartphone/tablet

2. When joining our meeting, CLICK on Join with Computer Audio or Call using Internet Audio.

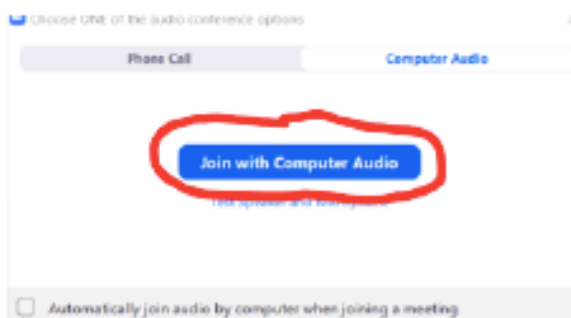


Photo: Screenshot of *Zoom* application when used on a computer

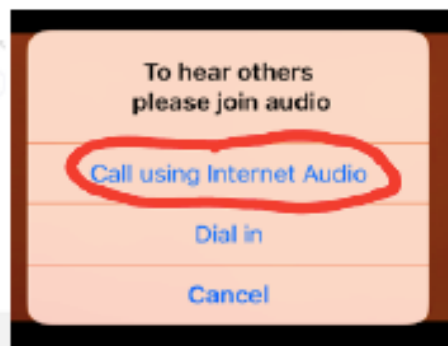


Photo: Screenshot of *Zoom* application when used on a smartphone/tablet

3. When indicated, during our meeting, please CLICK on Continue, when you are asked to consent to being recorded.

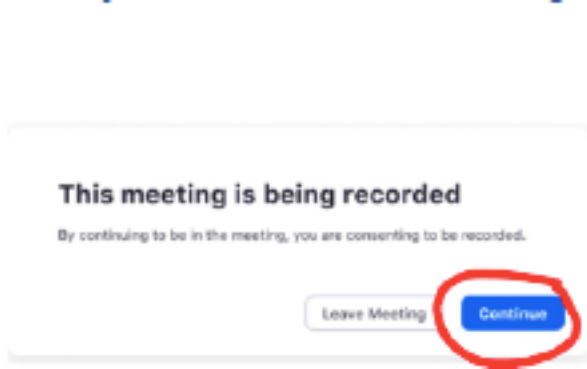


Photo: Screenshot of Zoom application when used on a computer



Photo: Screenshot of Zoom application when used on a smartphone/tablet

Other tips:

- Adjust your webcam or chair so your face is in the centre of the screen and you appear as you would as if sitting across from someone at a table. Avoid odd camera angles.
- Lighting should ideally come from the front to avoid shadows. Move to a more suitable location if using a laptop or tablet. Lower blinds to reduce excess natural light coming through windows.
- If using a phone/tablet, place it on a stand or propped up against books so it does not move around. Make sure the device is in a landscape (“sideways”) position rather than portrait. Adjust your sound by pressing the volume control buttons on the side of the device.

Appendix J

Resources for Participants who may Require Mental Health Support

Individualized services/resources list will be pulled for the interview participants who may require outreach programs/counselling/support.

Crisis Services Canada:

<https://www.crisisservicescanada.ca/en/looking-for-local-resources-support/>

- 1-833-456-4566 (24/7) or text 45645 (4 pm to 12 am ET).

Online Hope for Wellness Chat (for Indigenous peoples):

- Call 1-855-242-3310 (toll-free) or connect to the [online Hope for Wellness chat](#).
- Available to all Indigenous peoples across Canada who need immediate crisis intervention. Experienced and culturally sensitive help line counsellors can help if you want to talk or are distressed.
- Telephone and online counselling are available in English and French. On request, telephone counselling is also available in Cree, Ojibway and Inuktitut.

Provincial-specific crisis services listed below:

NOTE: These were all pulled from [Crisis Services Canada](#) and last updated January 11, 2021.

British Columbia

- All of BC

- o [Crisis Line Association of BC](#)

1800SUICIDE (24 hours): 1-800-784-2433 310

Mental Health Support (24 hours): 310-6789

- o [KUU-US Aboriginal Crisis Line](#)

Toll Free (24 hours): 1-800-588-8717

Adult/Elders Crisis Line (24 hours): (250) 723-4050

- BC Interior

- o [Interior Crisis Line Network](#)

Toll Free (24 hours): 1-888-353-CARE (2273)

Crisis Chat Service

· Coastal Region

o Vancouver Crisis Centre

Toll Free (24 hours): 1-866-661-3311

Toll Free TTY (24 hours): 1-866-872-0113

Crisis Chat: crisiscentrechat.ca

· Fraser Valley

o Fraser Health Crisis Line

Toll Free (24 hours): 1-877-820-7444

Crisis Line (24 hours): (604) 951-8855

o CTC Telecare Crisis & Caring Line (Providing Christian Crisis Intervention, Listening & Referrals)

Toll Free: 1-888-852-9099

Crisis Line: (604) 852-9099

· Northern BC

o Northern BC Crisis Centre

Toll Free (24 hours): 1-888-562-1214

Crisis Line (24 hours): (250) 563-1214

Toll Free Youth Support: 1-888-564-8336

· Richmond, South Delta, Ladner & Tsawwassen

o Chimo Crisis Services Crisis Lines

Crisis Line (8am-12am): (604) 279-7070

- o S.U.C.C.E.S.S Chinese Help Lines

Cantonese Crisis Line (10am-10pm): (604) 270-8233

Mandarin Crisis Line (10am-10pm): (604) 270-8222

- Vancouver Island

- o Vancouver Island Crisis Line & Chat

Toll Free (24 hours): 1-888-494-3888

Crisis Text: (250) 800-3806

Crisis Chat: www.vicrisis.ca

Alberta

- Alberta & Northeastern Saskatchewan

- o St. Paul and District Crisis Association

Toll Free (24 hours): 1-800-263-3045

- Calgary & Area

- o Distress Centre Calgary

Crisis Line (24 hours): (403) 266-HELP (4357)

Crisis Chat Support: www.distresscentre.com

Crisis Text & Chat Support: www.calgaryconnecteen.com

- o Wood's Homes

Toll Free (24 hours): 1-800-563-6106

Crisis Line (24 hours): (403) 299-9699

Crisis Text & Chat Support: www.woodshomes.ca

- Chinook Health Region & South Calgary Region

- o Distress and Suicide Prevention Line of Southwestern Alberta (CMHA - Alberta South Region)

Toll Free (24 hours): 1-888-787-2880

Crisis Line (24 hours): (403) 327-7905

- Edmonton & Northern Alberta

- o [CMHA Edmonton Region](#)

Crisis Line (24 hours): 1-800-232-7288

Crisis Line (24 hours): (780) 482-HELP (4357)

Seniors Abuse Helpline: (780) 454-8888

- Fort McMurray & Northeastern Alberta

- o [Some Other Solutions Society for Crisis Prevention](#)

Crisis Line (24 hours): 1-800-565-3801

Crisis Line (24 hours): 780-743-HELP (4357)

- Lakeland Region

- o [Dr. Margaret Savage Crisis Centre](#)

Crisis Line (24 hours): 1-866-594-0533

Crisis Line (24 hours): (780) 594-3353

- Strathmore & Area

- o [Wheatland Shelter Society](#)

Crisis Line (24 hours): 1-877-934-6634

Crisis Line (24 hours): (403) 934-6634

Saskatchewan

- Five Hills

- o [Five Hills Mental Health & Addictions Services](#)

Toll Free (8am-5pm, M-F): 1-877-564-0543

Crisis Line (8am-5pm, M-F): (306) 691-6464

- Hudson Bay & District

- o [Hudson Bay & District Crisis Centre](#)

Toll Free (24 hours): 1-866-865-7274

Crisis Line (24 hours): (306) 865-3064

- Northeast Region

- o [North East Crisis Intervention Centre](#)

Toll Free (24 hours): 1-800-611-6349

Crisis Line (24 hours): (306) 752-9455

- Prince Albert

- o [Prince Albert Mobile Crisis Unit](#)

Crisis Line (24 hours): (306) 764-1011

- Regina

- o [Regina Mobile Crisis Services](#)

Crisis Line (24 hours): (306) 525-5333

- Saskatoon

- o [Saskatoon Crisis Intervention Service](#)

Crisis Line (24 hours): (306) 933-6200

- Southwest Region

- o [Southwest Crisis Services](#)

Toll Free (24 hours): 1-800-567-3334

Crisis Line (24 hours): (306) 778-3386

- West Central Region

- o West Central Crisis & Family Support Centre

Crisis Line (9am-5pm, M-F): (306) 463-6655

Manitoba

- All of Manitoba

- o Klinik Community Health

Manitoba Suicide Prevention & Support Line (24/7):

1-877-435-7170

reasontolive.ca

Klinik Crisis Line (24/7):

1-888-322-3019

klinik.mb.ca

MB Farm, Rural & Northern Support Services (24/7):

1-866-367-3276

online crisis chat: supportline.ca

Manitoba Suicide Prevention & Support Line (24/7)

1-877-435-7170

www.reasontolive.ca

Other MB Provincial Crisis Line Services can be found at:

<https://www.gov.mb.ca/health/mh/crisis.html>

Ontario

- All of Eastern Ontario

- o Crisis Line

Bilingual Toll Free: 1-866-996-0991

Bilingual Crisis Line: (613) 722-6914

- Cambridge

- o [Telecare Cambridge](#)

Crisis Line: (519) 658-5455

- Durham Region

- o [Distress Centre Durham](#)

Toll Free: 1-800-452-0688

Crisis Line: (905) 430-2522

- Grey Bruce Owen Sound Area

- o [Grey Bruce Owen Sound](#)

Toll Free: 1-877-470-5200

- Kingston

- o [Telephone Aid Line Kingston](#)

Crisis Line: (613) 544-1771

- Kingston, Frontenac & Addington

- o [KFL&A Public Health](#)

Frontenac County Toll Free: 1-855-477-2963

Toll Free: 1-855-558-5151

- Lanark, Leeds & Grenville Counties

- o [Lanark Leeds and Grenville Mental Health Crisis Line](#)

Toll Free: 1-866-499-8445

- Niagara

- o [Distress Centre Niagara](#)

St. Catharines, Niagara Falls & Area Crisis Line: (905) 688-3711

Port Colborne, Wainfleet & Area Crisis Line: (905) 734-1212

Fort Erie & Area Crisis Line: (905) 382-0689

Grimsby & West Lincoln Crisis Line: (905) 563-6674

· Halton

o [Distress Centre Halton](#)

North Halton Crisis Line: (905) 877-1211

Oakville Crisis Line: (905) 849-4541

Burlington (Hamilton) Crisis Line: (905) 681-1488

· Northern Ontario

o [Talk4Healing](#)

Toll Free: 1-855-554-HEAL (4325)

· Ottawa & Region

o [Distress Centre Ottawa & Region](#)

Crisis Line: (613) 238-3311

· Peterborough

o [Telecare Distress Centre of Peterborough](#)

705-745-2273

· Québec & Ontario

o [Tele-Aide Outaouais](#)

Sans frais: 1-800-567-9699

Ligne d'intervention (Gatineau): (819) 775-3223

Ligne d'intervention (Ottawa): (613) 741-6433

- Toronto and Greater Toronto Area

- o [Distress Centres of Greater Toronto Area](#)

Crisis Line: (416) 408-4357

Survivor Support Program: (416) 595-1716

- Wellington & Dufferin Counties

- o [Family Counselling and Support Services for Guelph-Wellington](#)

Toll Free: 1-888-821-3760

Distress Line: (519) 821-3760

Toll Free: 1-877-822-0140

Crisis Line: (519) 821-0140

- Windsor & Essex County

- o [Distress Centre Windsor](#)

Crisis Line: (519) 256-5000

- York

- o [York Support Services Network Community Crisis Response Service](#)

1-855-310-COPE (2673)

Quebec

- Québec

- o [Association québécoise de prévention du suicide](#)

Sans frais (24h/24): 1-866-APPELLE (277-3553)

- Arthabaska-Érable

- o [Centre de prévention suicide Arthabaska-Érable](#)

Ligne d'intervention MRC d'Arthabaska: (819) 751-2205

Ligne d'intervention MRC de l'Érable: (819) 362-8581

- Bas-Laurent

- o [Centre prévention du suicide et d'intervention de crise du Bas-Saint-Laurent](#)

Sans frais (24h/24): 1-866-APPELLE (277-3553)

Ligne d'intervention: (418) 724-2463

- Faubourg

- o [Centre prévention suicide le Faubourg](#)

Sans frais (24h/24): 1-866-APPELLE (277-3553)

Ligne d'intervention: (450) 569-0101

- KRTB

- o [Centre prévention suicide du KRTB](#)

Sans frais (24h/24): 1-866-APPELLE (277-3553)

Ligne d'intervention: (418) 862-9658

- Saguenay & Lac-Saint-Jean

- o [Centre de prévention suicide](#)

Sans frais (24h/24): 1-866-APPELLE (277-3553)

Ligne d'intervention: (418) 545-1919

New Brunswick

- All of New Brunswick

- o [Chimo Helpline](#)

Provincial Helpline Toll Free (24 hours): 1-800-667-5005 Fredericton Area (24 hours): 450-HELP (4357)

- Bathurst

- o Mobile Crisis Units

Crisis Line (8am-8pm): (506) 547-2110

- Fredricton

- o Mobile Crisis Units

Crisis Line (4pm-12am, M-F; 3pm-11pm, S-Su): (506) 453-2132

- Moncton

- o Mobile Crisis Units

Toll Free (2pm-10pm): 1-866-771-7760

- Saint John

- o Mobile Crisis Units

Toll Free (8am-12am): 1-888-811-3664

- St. Stephen, St. George & Grand Manan

- o Mobile Crisis Units

Crisis Line (24 hours): (506) 466-7380

- Woodstock & Perth-Andover

- o Mobile Crisis Units

Toll Free (2pm-10pm): 1-888-667-0444

Nova Scotia

- All of Nova Scotia

- o Provincial Crisis Line

Operated by Mental Health and Addictions, Nova Scotia Health Authority

Toll Free (24 hours): 1-888-429-8167

General Inquiries: (902) 429-8167

Prince Edward Island

- Prince Edward Island

- o [Canadian Mental Health Association](#)

- General Inquiries: (902) 566-3034

- o [Island Helpline](#)

- Toll Free (24 hours): 1-800-218-2885

- Newfoundland & Labrador

- Newfoundland & Labrador

- o Mental Health Crisis Centre

- Toll Free (24 hours): 1-888-737-4668

- Crisis Line: (709) 737-4668

- St. John's

- o Waterford Hospital - Mental Health & Addictions

- Toll Free (24 hours): 1-888-737-4668

- Mental Health Crisis Line (24 hours): (709) 737-4668

- Yukon

- Yukon

- o [Rapid Access Counselling Services](#)

- Northwest Territories

- Northwest Territories

- o [NWT Help Line](#)

- Toll Free (7pm-11pm): 1-800-661-0844

- Nunavut

- Nunavut

o Awareness Centre

Crisis Line (24 hours): (867) 982-0123

· Nunavut and Nunavik (Arctic Quebec)

o [Nunavut Kamatsiaqtut Help Line](#)

Toll Free (7pm-11pm): 1-800-265-3333

Crisis Line (7pm-11pm): (867) 979-3333