Exploring learning in midlife

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In the last two decades, researchers have focused increasingly on the middle years of adulthood as an emerging topic in the adult literature. The reasons for this include: the aging of the Canadian baby-boom population, who now have reached the middle years of life (Statistics Canada, 2007); healthier lifestyles of these midlife adults (Brim, Ryff, and Kessler, 2004); the recognition of midlife as a unique and distinct stage of adulthood (Lachman, 2001); and, the interdisciplinary developments linking midlife to both the adult development and the adult education literatures (Hoare, 2006). Collectively, these new directions offer innovative dimensions in our thinking about the middle years of our lives.

Midlife adults experience life changes that bring both opportunities and challenges. In this chapter, we will explore this issue in more depth from the context of learning and development. The definition of the term *midlife* is briefly explored, followed by investigating three unique ways in which learning occurs in the middle years: (a) transfer learning; (b) transition learning; and, (c) transformative learning. The chapter concludes with implications and future directions.

The middle years

Demographically, the ages between 40 and 60 have traditionally been labelled as the midlife years. Increasingly, however, this is expanding by adding a decade to either side of the 40–60 year benchmark. For example, when asked, middle-aged adults report feeling about 10 years younger than their demographic age (Montepare and Lachman, 1989), thereby representing midlife as ages 30 to 70 or 75 (National Council on Aging, 2000). Perhaps the more useful definition might be that midlife is best described as occurring between the ages of 50–75 years of age (Schuller and Watson, 2009). This age range seems particularly appropriate, given that adults are living longer and healthier lifestyles as a result of enhanced personal, technological, medical and community directions.

Psychologists such as Freud, Erickson, and Lovenger offer traditional foundations that have prescribed child, adolescent and adult development over past decades. Each provides different ages and stages for the onset and resolution of specific developmental life tasks. Conversely, the elderly years were not well defined and were characterized as a downward spiral, with diminished opportunity and infirmities leading to eventual death. While this may have been accurate decades ago, the situation today finds midlife adults continuing to follow new life paths with health and an extended life expectancy. A “disconnection” is
drawn between the traditional psychosexual and psychosocial dilemmas of twentieth century theorists and the contemporary North American adult in the prime of midlife.

In response to this developmental fly in the psychology ointment, interdisciplinary literature offers a refreshing view of this situation. As a prominent theologian at Princeton Theological Seminary, Capps (2008) argues that middle age is, in fact, a period of tremendous personal change. He explains that the “self” evolves in different ways through the middle decades of life. For example, adults in their 50s focus on the “faithful self”, which stretches into their 60s, when an appreciation for the “loving self” is felt. As adults grow into their senior years marked by their 70s, caring for oneself and for others is increasingly important to them to ensure promotion of good health and well-being. Continuing development is the foundation of a “wise self” throughout the 80s, while the “grateful self” is often the hallmark of adults entering into their 90s. The “enduring self” is critical in the most senior years of life, typically reached by those living their lives to the age of 100 years and beyond. Capps’s (2008) categories reveal much about the change that occurs in adulthood over the middle years, while presenting unique understandings about the aging phenomenon over the lifetime.

Under the umbrella of Capps’s (2008) unique developmental approach, adults in midlife continue to adapt, confront and/or create new life opportunities. Just as a summer job can influence a young person’s decision to pursue a particular career, so too can an event influence a midlife adult decision to pursue new paths. Sometimes, these opportunities develop quite unexpectedly, while others may occur with regularity. In any event, the way in which adults address these events tells much about the processes of learning and coping in midlife. In fact, by the middle years, learning is well developed, easily drawn upon and serves as a rich resource in ways that were not possible in the early adult years.

As we age, life offers new opportunities. For example, thinking about retirement, a frequent thought by midlife adults aged 50 years plus, Jarvis (2001) notes the importance of retirement rituals often associated with this change in life. The process of retiring means that one is departing from an activity (e.g. a full-time job) by embarking on a ritual of separation, transitioning from one lifestyle to another, and commencing a new direction marked by an incorporation ritual.

Similar to the process of retirement described above, the context of learning in midlife also is multi-faceted. In this chapter, we explore three out of many types of learning. Adults must decide to engage in new learning (i.e. transfer learning); they explore new ways or act(s) of learning (i.e. transition learning); and they use their new learning to pursue life directions (i.e. transformative learning). Each of these is described below.

**Transfer of learning in midlife**

The middle years are a time when adults tend to ask self-reflective questions about themselves and their lives. These questions are often highly individual, are of a personal nature and may or may not be shared with others. They have the potential to be very influential in determining future life events. They can be asked out of a desire to explore existing or new possibilities, to identify feelings, or to weigh potential benefits and/or limitations of events in life. The answers can be life-changing. Responses can offer insight into the way in which transfer of learning occurs for an adult in midlife.

Much has been written on transfer of learning and the skills that are used in this self-directed process. Leberman, McDonald, and Doyle (2006) described the transfer of learning from the perspectives of behaviors, cognitive structures, information processes, workplaces and cultures. While each represents different types of transfers, many traditional transfer schemes fail to provide insight into the way in which this learning occurs in midlife adults.

In fact, understanding the transfer of learning is critically important to midlife development. Wlodkowski (2003) argues that adults must be continually motivated to transfer learning over the middle years, otherwise they may well become reluctant or even resistant to new learning over time. A failure to continue to
be motivated, excited or interested in new situations can lead to the development of learning “blocks” and a resistance that may well reduce interests and abilities into the elder years.

This transfer of learning is a crucial base in the continued psychosocial development of healthy and active midlife adults. Surry et al. (2004) define a number of conditions to promote this personal and proactive transfer of learning. For example, adults need to continue to be involved in new learning activities and events that foster the steady improvement of personal knowledge, skills, and innovation. Time, support, and stimulation are also critically important in this process. Adult educators, faculty, instructors, facilitators, coaches, and educators can be helpful in promoting transfer and linking past with present events to offer future opportunities. Incentives can be useful benefits for those who seek to take up these opportunities.

The types of changes that adults realize when transfer of learning occurs can be quite dramatic. This is particularly true for midlife adults who may be asking questions related to self in conjunction with their past, present, and future directions. Ferguson (1980) explains that sometimes an adult can “change by exception” by experiencing an event and adapting to this change by altering one’s personal belief structure (e.g. one who changes his or her life work as a result of medical illness). Others may experience “incremental change” by slowly but consistently developing in small but largely unnoticed ways (e.g. the midlife learner who steadily evolves as he or she progresses through a graduate program). More pronounced is the “pendulum changer” who, upon considering a new learning perspective, becomes convinced of the need to change or convert to an opposite viewpoint (e.g. the person who leaves a CEO position to become a philanthropic donor). In each case, it is this process of growing and developing from a previous knowledge base to a new perspective, concept, or understanding that makes this transfer or exchange a reality. These changes may be large or small, but they can provide new ways of seeing and experiencing life in middle age. Moreover, these transfer possibilities can lead to positive trends beyond midlife and into the senior years of life.

**Transition learning in midlife**

Further along the continuum is the act of transition learning in midlife. For this to occur, transitions evolve that are both welcomed and expected. These include, for example, predictable transitions such as school leaving, development of relationships and marriage, birth of the first child, entrance or re-entrance to university, or work promotions. These anticipated transitions (Goodman, Schlossberg and Anderson, 2006) are typically changes associated with family, friends, and work, and each necessitates readjustments to life realities. In early adulthood, these transitions are instructive, because they provide learning opportunities that enable adults to learn how to shift, adjust, adapt, readjust, and grow from these experiences.

Bridges (1980) argues, however, that the transition events in midlife are very different from those in early adulthood. While middle adulthood is often a process of settling down and maintaining life priorities, midlife transition events often occur unexpectedly and in very unpredictable ways. In fact, frequently they are potentially life-changing events. These events are described as unanticipated transitions (Goodman, Schlossberg and Anderson, 2006) and are most noteworthy as midlife adults often have not developed past learning strategies to cope with these present transitional events. This is particularly true for transitions that are life-changing, such as separation, divorce, loss, or death of a loved one. In fact, transitional events can produce a shocked response as individuals try to deal with these challenges. In describing these events, Parkes (1971) proposed the term *psychosocial transitions*, defined as “a change that necessitates the abandonment of one set of assumptions and the development of a fresh set to enable the individual to cope with the new altered life space” (p. 103). These unanticipated transitions may include, but are not limited to, illness, terminal diagnosis, loss of a significant partner, divorce, bankruptcy, or even natural disasters. Adaptation, accommodation and change in assumptions by the individual(s), the environment, and the
complex relationship between these factors (Goodman, Schlossberg and Anderson, 2006) serve to influence
the learning that develops over this time and into the future.

These transitions represent truly major challenges, as adults must also continue to cope with daily life
events while at the same time addressing the event. Transitions and the learning that they provide can be com-
plex, risky, and timely, because these unplanned events do not occur in isolation, but often within the
context of families, work, social obligations, community involvement, and other responsibilities. These add
pressures to the responsibilities, contorted timelines, and expectations to which midlife adults must respond.
Adults can, in fact, often become psychologically buried by these multiple requests to respond. This is
especially true for adults who are required to respond over a lengthy time period. To ease the load, stra-
tegies need to be put into place to cope with this new experience, while continuing to address these daily
activities.

The learning that occurs from these transitional events is often undervalued. In fact, an explosion of
learning can occur as the transitional event is explored with others. How was the event discovered? What
are the short- and long-term needs to manage the situation? What are the options? Who can help? These
questions prompt learning that is often highly applied (e.g. learning the what, where, how, when, and why
of the event), content-specific (e.g. learning about the reasons, incidences, trends, patterns and outcomes
related to the event), and with relevant timeframes (e.g. learning about short- and long-term needs and
expectations, and future placements and strategies).

Transition learning continues as more information is gathered. Family members anxiously await a diag-
nosis; human resource responses provide further information about the “redundant job”; or a court date is
set that will provide decisions. As a result of waiting, hoping, listening, arguing, responding, and discussing
these critical life events, self-reflection occurs in this process of transition learning. These personal and
private times offer golden opportunities to learn about oneself, about other support, and about new ways
of being in the world. Goodman, Schlossberg and Anderson (2006) note that working through this transitional
process prompts personal growth and development.

Adults experiencing unanticipated transitional events often develop personal learning strategies that
become “anchors” for their transitional learning experiences. Anchors are a way to turn learning instability
into stability. They can take many forms. For example, a medical crisis such as a stroke may lead to the
assembly of a transitional team composed of neurologists, physicians, nurses, pharmacists, occupational
therapists, physiotherapists, caregivers, psychologists, social workers, homecare workers, and other profes-
sionals. For job loss, a personal learning team may be established consisting of human resource personnel,
lawyers, counsellors, career and/or educational experts, and coaches. These teams provide personal learning
strategies by offering new knowledge, coping skills and learning anchors to support adults during the event(s)
and, ideally, after the transition event(s) have passed. In this way, new paths of learning and maturity can
develop.

Transformation learning in midlife

This is perhaps the most significant of the three learning processes discussed in this chapter. While learning
remains an essential building block of adulthood, life events often seem to occur randomly, but can also
introduce new opportunities. It has the power to make a significant change in life. Personal transformation
learning is about this change—“dramatic, fundamental change in the way we see ourselves and the world in
which we live” (Merriam, Caffarella and Baumgartner, 2007: 130). Transformation is a major paradigm shift that
has the power to transform an adult’s life. It allows the creation and development of new ways of living in
life. Living life without smoking, managing life with an illness, or loving again following the death of a
spouse all require shifts in learning about self, relationships, society, and the world. It is a process of learning
deeply and meaningfully to effect change and direction for oneself and others. Readers are encouraged to
read the chapter on transformative learning in this volume to learn more about this phenomenon.
Mezirow (1990) is a pioneer in transformative learning literature. He argues that adults must be faced with a “disorienting” learning dilemma for which a solution is not readily available. The learner examines his or her personal assumptions to identify why s/he is discontented or affected by the dilemma and then explores options that create new roles, relationships and/or actions. By working through the process of testing, adapting, and developing renewed self-confidence, a new perspective is found and is progressively integrated into the learner’s life (Mezirow, 2000). While this process appears straightforward, in reality it often occurs in a complex and disorganized fashion. Of the three approaches explored in this chapter, transformative learning is potentially the most dramatic, elusive, surprising, and powerful in the way that it can influence and change lives.

Underlying this process of learning are the values of critical reflection and analysis which represent the hallmarks of transformative learning in the middle years of life. Adults may decide that they have enjoyed the fruits of labour and that the time is right to follow other paths in retirement. Alternatively, some may decide to pursue new careers while they are healthy enough to enjoy the challenge, while others may decide that the departure of children now offers new opportunities to travel, to downsize or to focus on relationships. In each case, this life-changing transformation learning process provides opportunities to reflect on the past, to understand the present, and to initiate action that will cause one to live one’s life in new ways.

Just having a transformational experience is not enough for this type of learning to occur. In fact, a person may not at first recognize experiences as transformational – especially if these events occur quietly, with little notice. For this reason, midlife adults are wise to look, listen, feel, and see their world as a place of surprises, experiences and unpredictable occurrences as signposts along life’s path.

An example of transformation learning was a study of midlife adults completing non-traditional graduate degrees by distance education in selected Canadian institutions over the last decade (Willment, 2008). The results were staggering. Of six midlife learners who completed Master’s degrees while continuing to work full time, all have left their former occupations and have developed new skills sufficient to pursue new directions in their lives as a result of graduate study. In fact, two have left their former occupations and now teach in universities; two have progressed from middle managers to senior administrators in new workplaces; one has retired and is presently pursuing full-time doctoral studies, while another is presently working in the field of her Master’s degree that was interrupted with marriage and child-rearing earlier in her life. Each has undergone a profound transformational life change by completing a graduate degree in their middle years.

These three personal learning processes described in this chapter are profound in midlife. They signal major life changes that often produce unexpected results at times when life change was needed. Often, however, these changes occur in complex ways, and this is the focus in the next section of this chapter.

Implications

The chapter reveals the transfer, transition and transformative learning processes experienced by adults in midlife years. While learning is always possible, it can also be complicated by additional issues in midlife. This is explored below.

Most adults develop an internal learning repertoire to respond to the needs of their daily lives. This is particularly true for midlife adults who have developed experiential learning strategies that are comfortable and responsive to meet the needs of their personal, work, family, and community lives. Coping and adaptation becomes more complex, however, when this learning repertoire does not contain the necessary responses to a new issue or life situation. How can one respond to the experiences, when no previous learning path is etched out? Learning how to “adjust” to the departure of children from home; learning to “cope” on a daily basis with a terminal illness; living “through” the death of partner; coping “with” grief; or “finding” new routines in retirement are changes for which we are not prepared and can present
difficulties as we adjust to new realities. The “old” established learning repertoire does not address the “new” learning required. It takes time to learn how to build bridges between that which is known and that which is needed in midlife.

These “paradoxes in learning” often create disruptions, causing feelings of stress, anxiety, continual fatigue, and even depression. In extreme cases, medical illness can develop. Conversely, if learning paradoxes can be addressed promptly, the health and well-being of adults will be preserved with personal growth, integrity, and lifelong development. In this section we explore examples of the dimensions of learning paradoxes, the environments in which learning paradoxes may occur, and the timing of learning paradoxes. Some strategies for coping with each is discussed to support adults in these times.

Dimensions

Three paradoxes are illustrated that adults in midlife are often faced with when confronted by new situations. These are described below.

Instability versus stability

Transfer, transitions and transformative learning do occur, but they often do not happen immediately. An unexpected event may occur, but time is needed for one to understand and respond. This is especially true in midlife when adults often “juggle” multiple roles and stressors in their daily lives. A sense of instability, a loss of confidence, or lack of direction can often have unpredictable and surprising results.

Several coping strategies can be especially helpful during this time period. Midlife adults usually have personal and social support systems to draw on in times of need. Taylor (2000) suggests that trust and friendship are essential for adults as they live and learn through a life-changing experience. This support is often augmented by medical, legal, mentoring, or professional team members who can listen, suggest, and indirectly help to create a learning plan for adults in this time of crisis. Short- and long-term plans, options, and coping strategies are useful. In so doing, adults are able to pull from their past strengths, to create plans that will introduce new strategies to move from instability into stability.

Confusion versus complexity

Life events do not occur linearly or separately, but often through confusing and chaotic life events. These events involve others either directly (e.g. marital problems, a desire to return to school) or indirectly (e.g. the impact on others, managing the financial affairs of the family). These can be incredibly confusing events and times for adults and others. This is especially true for women, who often subsume their own needs for others when touched by confused and chaotic events.

Confusion is felt when comfort is upset by new experiences. For example, adults in midlife may wish to expand their learning in new ways by enrolling in part-time graduate programming, yet the mature adult may feel this is quite impossible as a result of unfamiliarity about the use of technology in an online graduate program. This creates feelings of stress, anxiety, and in some cases panic. Transition learning becomes much more difficult when learners automatically “assume” that barriers exist to graduate studies.

Learner-centered faculty members can help to reduce student stress by working with individual mature adults to untangle these issues. Through this process, mature learners should be encouraged to identify and articulate where and why they are having difficulties. Faculties need to work alongside to help with the development of personal plans, thereby reducing confusion in learners. By progressing through a series of small steps and accomplishments, the learning actually can move from confusion to complexity in such a way that personal development can flourish. In so doing, this transfer and transition learning can profoundly influence adults’ self-understanding, insight, and new direction in the world (Willment, 2008).
Risk versus comfort

The opportunity to pursue new learning comes with risks. The older that one gets, the riskier new learning can become, if one has allowed this behaviour to lapse. The risk-taking activity especially associated with the use of new technologies can shut down the world of a retired person, as opportunities to learn are severely reduced when one disengages from the workforce.

Engaging in risk-taking can be undertaken if knowledgeable, consistent and inviting support is given to overcome the learning difficulties associated with new ways of addressing problems. For example, the ability to learn to use, benefit from, and try new approaches multiplies when midlife adults are given access to knowledgeable, helpful, and consistent services. In fact, some corporations have discovered this niche in business. For example, Apple Computers has liberal and continued access to consultants who provide ongoing lessons to customers via retail outlets. By providing ongoing access to knowledgeable personnel, consumer risk-taking is encouraged with high levels of personal comfort. In so doing, customized service is the way in which Apple does business with new and existing customers, while adding to the corporate bottom line of returning customers and profitability.

Environments

Most physical settings contain a learning culture that can help or hinder the pursuit of learning in midlife. Further, the implicit versus explicit nature of learning cultures can invite, direct or discourage this activity. The following incident illustrates the point.

Several years ago, I was employed as an administrator within a university and decided to pursue a doctoral degree part-time while continuing to work. While I had wonderful encouragement to pursue studies from the office director, this was not the case once the director left and an interim manager was appointed. In a university designed to promote all types of learning, it was explicitly stated that further education was valued by the institution, and yet implicitly it was quickly apparent that enhancement in further education was neither encouraged nor rewarded. In fact, quite the opposite was true. Fortunately, my doctoral program was provided at another institution. The learning culture was such that, when the time was right, I left the job and moved to a parallel track to complete my studies. The lesson learned is always to think twice about working and enrolling in part-time graduate programs of study within the same institution. When the doctorate was completed I accepted a faculty position at another university working with midlife learners with further continuing education desires. I have never looked back. These life experiences can deeply impact midlife adults, depending on the learning culture in which one is employed.

Timing

The commencement of new learning can bring at once joy, frustration, curiosity, opportunity, and a steep learning curve. New learning is rich with insights and growth, but is also accompanied by barriers and challenges that must be overcome for successful learning to occur. As a result, there will be times when it is best not to assume new opportunities, while at other times adults should actively seek new opportunities. If decisions are made quickly without forethought, then failure may occur. The goal should always be to try and match readiness with opportunity for maximum positive outcome.

The secret to realizing opportunities rests, in part, with timing. In today’s world, timing can be critically important in the pursuit of new dreams. It is usually helpful in advance to consult with others who may be experts in the field, counsellors, trusted colleagues, and/or other knowledgeable networkers, who are often quite pleased to lend assistance in the development of a potential life-changing learning plan. This places midlife adults in positions of control and strength, and is consistent with Capps’s (2008) stages of midlife development.

The application of these learning strategies to respond to learning paradoxes is consistent with midlife adults needing “the freedom to live with change, to invent and reinvent themselves a number of times
through their lives” (Butler, 1975: 401). If learning through reinvention is limited or blocked in midlife, the potential for the development of a healthy and positive outlook may be more difficult as adults move into the senior adulthood years.

**Future directions**

Within the foundation of traditional and contemporary theorists such as Capps (2008): three learning approaches are reviewed for midlife adults. Preliminary evidence suggests that adults face paradoxes in their forms of learning throughout midlife. Learning paradoxes are examined in the context of dimensions, environments, and timing, with resources suggested that are designed to help midlife adults meet new learning opportunities. In so doing, midlife adults learn more about their learning changes, the learning environment in which these opportunities exist for them, and the timing of their learning changes. This helps in setting a continued life course. By so doing, it is possible for midlife adults to move forward into the “wise self” in the 80s, the “grateful self” in the 90s and the “enduring self” in the eleventh decade of life.

**References**


