Emerging Professionals in the Field of Learning in Retirement: A Multiple Case Study

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In the present study, we compared the professional culture, mentoring, and work-life expectations of six female emerging professionals in the field of learning in retirement to what they actually have experienced. To date, we have not encountered prior published studies related to emerging professionals in this field and only one study, Peterson (2006), conducted research regarding learning in retirement professionals. In the present exploratory multiple case study, we described and interpreted the professional culture, mentoring functions received, and work-life experiences (e.g., successes and challenges) of emerging professionals in lifelong learning and measured the professional expectations of the participants against their actual described experiences. We identified five themes that describe the situational positioning of emerging professionals in learning in retirement within their institutes, universities, profession, network for professional growth, and overall professional network. The impact of the present study may help to provide targeted professional development, succession planning, and greater opportunities for networking to personnel in this field.

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Older adults in the United States have re-entered academia in recent decades as colleges and universities across the country began offering learning in retirement programs. However, an implicit bias exists against older learners and the programs serving them (Gaskell, 2001, 2002). Such bias legitimizes cultural marginalization of older adults in part by blaming the individuals for their own decline (Gaskell, 2001). These programs frequently are housed in University Continuing Education (UCE) divisions, with the dominant belief being that they make little contribution to the overall organization and require few university resources (Bitterman, 2013). At the same time, the UCE divisions often are viewed as peripheral to the

university's academic and research missions. Within the UCEs, program leaders are expected to rely upon volunteers for clerical tasks rather than recruiting professional staff which further de-professionalizes their higher education programs (Peterson, 2006).

Professionals serving in learning in retirement roles are isolated because of the bias against whom they serve and the de-professionalism of their units within their organizations. Due to the relative novelty of this field, professionals work without the benefit of professional organizations and preparation programs. Emerging professionals in the field of learning in retirement begin their career without the benefits of a formal graduate education in the specific discipline (Tull et al., 2009), as would be expected in other areas of education such as counseling or student affairs. Neither do they have access to journals and peer-developed research, access to networking and conferencing, nor a professional membership organization encompassing their field. While many professionals migrate to the area of learning in retirement later in their careers with the transferable skills to socialize, network, and discover, those individuals who assume a professional position within such an institute early in their career potentially face significant challenges (Peterson, 2006).

The Osher Foundation provides grants to universities across the country to establish the Osher Lifelong Learning Institutes (OLLIs) or to strengthen existing ones accounting for approximately 20% of learning in retirement programs housed within institutes of higher education (Peterson, 2006). OLLIs are designed for retired or semi-retired adults and they offer a variety of semester long and short courses, special series lectures ranging from an array of different subjects, and field trips. Bitterman (2013) noted that "an invaluable aspect of the Osher Lifelong Learning Institutes is the sense of community informed by social facilitation" (p. 96). Participants in OLLI, referred to as members, are able to make new friends, expand their intellectual and social horizons, and assign a new purpose to their lives (Bitterman, 2013). The Osher Foundation also established a National Resource Center (NRC) to serve as a clearinghouse providing a monthly newsletter, training, and a conference every 18 months for affiliated institutes (Bitterman, 2013). As such, the NRC became a substitute source for professional socialization.

Socialization into a profession occurs among four realms: personal, or the individuals in their role; institutional, the individuals as members of their organization; extra-institutional, the individuals, their organization, and their respective intersections with other institutions with which they interact; and professional, the individuals within their chosen profession (Hirt & Creamer, 1998). Professional organizations actively recruit graduate students in student affairs that provide opportunities for involvement in their profession, networking and relationship building, and ongoing professional learning prior to their graduation (Duran & Allen, 2020). In this regard, professional organizations embrace their role in socialization of emerging professionals, and, in some cases, create programs expressly for this purpose (Duran & Allen, 2020). We have found no published studies involving learning in retirement professionals, nor do such professionals have shared graduate preparation programs nor formal professional organizations.

Learning in retirement professionals become part of the culture of their profession in the occupational socialization process which is composed of three phases: acculturation, professional socialization, and organizational socialization (Richards et al., 2016). Acculturation is a process by which professionals become more strongly identified with their role through an integration of their values and worldviews with that of the institution and the profession in which they work (Wilcoxon et al., 2010). Professional socialization takes place in the postsecondary training for a career (Richards et al., 2016), and is a phase of occupational socialization that includes the structured development of values, skills, and knowledge of thorough professional education in a given field (Flory, 2015). Finally, organizational socialization is that which occurs on the job in the initial place of employment in a particular field as well as within professional organizations (Richards et al., 2016).

In addition, given the absence of professional organizations and formal academic training, the importance of mentors as tools for professional socialization in the field of learning

in retirement is magnified. Mentoring is a social and dialogic process, firmly rooted in social cognitive and socio-cultural theories, in which a more experienced individual serves as a role model and teacher to one with less experience. In the most basic sense, mentoring is the relationship between a more experienced mentor and less experienced protégé (Schunk & Mullen, 2013). Johnson (2007) defines mentoring as a developmental relationship that facilitates socialization, learning, career advancement, psychosocial development, and leadership preparation. Kram (1983) described nine functions of the mentoring relationship, including the career development functions of sponsorship, coaching, protection, challenging assignments, and exposure and visibility, as well as the four psychosocial functions of role modeling, counseling, friendship, and acceptance and confirmation. Mentoring, like several other models of professional development, relates to the Vygotskian concept of social mediation (Shabani, 2016) and the concept of social situation of development (Veresov & Mok, 2018). Social mediation implies that outside factors can influence a learner's growth and development (Vygotsky, 1978). The concept of the social situation of development entails that forms of development must exist first in individuals' social environments before appearing in individuals (Veresov & Mok, 2018).

In the mentoring relationship, it is often assumed that the mentor has greater knowledge than the protégé in the areas of knowledge for which the protégé is seeking help. The zone of proximal development (ZPD) refers to the gap between what the protégé can do unassisted and what they potentially can do with the assistance of a more knowledgeable person such as a mentor. Further, as identified by Vygotsky (1978), the ZPD is the distance between a learner's actual development and the level to which they can develop under the guidance of someone more capable (Daniels, 2001; Robbins, 2001). While the ZPD accounts for individuals' mental development, Vygotsky also was interested in their *perezhivanie*, a concept and a process referring to the lived experience of a learner (Veresov, 2017). Perezhivanie is the unit of analysis in which the concept of social situation of development of individuals is considered from their standpoint. It accounts for

their mental, affective, and cognitive perceptions and experiences of the world (Veresov & Mok, 2018). As a process, perezhivanie refers to the way in which the collective experiences of a learner impact the learner's own development (Mok, 2017; Veresov, 2017). In a mentoring relationship, if the mentor or the protégé develops and changes according to their experiences, so too does the social situation of development in which they are embedded along with their zones of proximal development.

Therefore, the purpose of the present multiple case study was to describe the challenges such early career professionals faced in the absence of a typical socialization into this field. We compared the professional culture, mentoring, and work-life expectations of emerging professionals in the field of learning in retirement to what they actually have experienced. We chose an exploratory multiple case study approach because we wanted to understand what can be learned about this particular issue from multiple participants in different institutions (Putney, 2010; Yin, 2003).

We analyzed the findings of this exploratory multiple case study in accordance with the theoretical framework integrating prior research regarding professional socialization, mentoring theory, and Vygotsky's sociocultural theory. To date, we have not encountered prior published studies related to emerging professionals in this field and only one study, Peterson (2006), has conducted research regarding learning in retirement professionals. We answered the following research questions: What are the experiences of emerging professionals in the field of learning in retirement in regard to support, networking opportunities, and professional development? How do these experiences compare to the participants' initial expectations?

Method

Participants

The targeted population was emerging professionals in the program development and management of learning in retirement institutes at colleges and universities in the United States. For the purpose of the present study, the term emerging professionals refers to individuals who have five or fewer years of full-time employment post bachelor's degree; are seeking a

career path in the leadership of lifelong learning institutes; are currently or recently employed in a higher education-based lifelong learning institute; and who are working in a program management, development, or related professional (non-clerical) position. With assistance from the National Resource Center for Osher Lifelong Learning Institutes at Northwestern University, a purposeful sample of eight emerging professionals meeting the aforementioned criteria were identified. Six of the professionals consented to participate in the present study and two declined to participate. All six of the participants worked in Osher Lifelong Learning Institutes at state universities in the northeastern, southeastern, mid-Atlantic, and southwestern United States. All six identified as female and all six had earned master's degrees. The age range of participants was between 26 to 33 years old. Their pseudonyms are Anna, Bonnie, Erica, Mary, Sharon, and Theresa.

Data Collection

Measures included a Qualtrics survey asking questions about demographic information such as gender and age, as well as general information regarding their education, academic majors, current position length, and duties performed. Following the survey, participants were assigned to one of two online focus groups. Each focus group, consisting of three participants, a facilitator, and a research observer, met twice. Following the two meetings, all participants were individually interviewed by the facilitator and the research observer. The individual interviews occurred after the focus groups so that in addition to allowing for deeper discussion with each individual, participants could share what they learned from each other within the focus groups.

Each of the two focus groups consisted of a semi-structured conversation utilizing the Complementary Analysis Research Matrix Application (CARMA; Putney et al., 2006; Putney, 2014) to compare the actual experience of participants with what the participants would consider an ideal professional experience. The two focus group sessions captured two points of time from participants and enabled them to interact with each other based on the questions proposed. The first focus group session, with three participants, focused on participants' structures

and roles, professional development, mentoring, and networking experiences. In the second focus group session, the same three participants described their achievements, professional opportunities, professional support, and challenges. We repeated this process with another group of three participants.

After the first and second focus group sessions, we developed the individual interview questions in part based upon the information constructed in the focus groups, including discussion of their professional experiences, challenges, and rewards; mentoring experiences; the connections made during the focus groups; and the aspects of the discussion that were or could be beneficial in their work. In the online individual interviews, participants answered questions about their thoughts regarding listening to the other participants from their focus groups and if any other participant from their focus groups could be identified as a potential mentor. Additionally, the participants explained which factors discussed in both focus groups could be beneficial to their work or professional development, and their desire for future professional development, mentoring opportunities, achievements, and challenges.

The focus groups and interviews consisted of semi-structured questions utilizing CARMA (Putney et al., 2006), a qualitative analysis technique originally intended for ethnographic and participatory action research, to compare the actual experience of participants with what the participants would consider an ideal professional experience. More specifically, Putney et al. (2006) initially developed CARMA for teachers to reflect upon their classroom practices from a Vygotskian perspective, stating: "In a Vygotskian sense, this framework becomes a tool for mediating the information collected in the course of the action research process" (p. 27). More recently, CARMA (Putney, 2014) has been used in numerous other settings outside of action research in which reflective activity is useful for evaluating programs, improving practice, or for recognizing the impact of a particular practice on various stakeholders and participants. This research analysis tool draws directly from the reflexive relationship and unity between the individual and their environment as described by Vygotsky, allowing the researcher to move from description to interpretation,

and finally transforming these interpretations to create a path to praxis through implementation (Putney et al., 2006).

While CARMA is a tool for method of analysis and not a data collection technique method, we used its structure to develop questions for our semi-structured focus groups and interviews that would be consistent with this model of analysis. We developed questions based on emerging professionals' expectations and experiences to understand their lived experiences. Some examples of our semi-structured focus group questions were the following: How does your role fit in your institute's structure? How does it compare to your expectations? How can this fit be improved? Additional sample questions included: From whom do you receive support within and outside your institute? How does it compare to your expectations? How can this support be improved? In our semi-structured interviews, we developed the following questions: In our focus group meetings we talked about professional experiences, roles, and institute structures; achievements, opportunities, and challenges; professional development, networking, and mentoring experiences. What resonated with you listening to your colleagues? What thoughts do you have today on those topics?

We used the CARMA tool as a guiding tool for conducting interviews to compare the potentially ideal situation with the actual experiences of the participants. In order to understand the cultural aspects of the field of learning in retirement and the professional identities of early-career professionals, we turned to Spradley's (1979) domain and taxonomic analysis. For the domain analysis, we viewed the data generated by the focus groups and interviews as cultural scenes or domains (Spradley, 1979). Cultural domains, according to Spradley (1979), are categories of meaning. Like domains, taxonomies also attempt to categorize components of a culture or phenomenon. However, while domain analysis establishes the components of each category in a culture, a taxonomy further classifies the relationships among items within each category. A taxonomic analysis allows researchers to compare these relationships among the participants of a study (Spradley, 1979). In the present study, however, most participants of the groups worked in isolation from each other,

which impacted the framing of the taxonomies. Utilizing CARMA, domain analysis, and taxonomic analysis, we analyzed the qualitative data separately from each other, providing triangulation. Using multiple tools of analysis and the perspectives of more than one researcher allows for the identification and reduction of inherent bias that may be present and otherwise unnoticed (Bryman, 1984).

Procedures

The data collection for the present study occurred entirely online. Both the initial questionnaire as well as the informed consents were distributed and collected through Qualtrics. The leadership of the Osher Institutes' National Resource Center at Northwestern University assisted in the identification of the subject pool, providing a list of approximately 20 potential participants. The lead researcher identified eight from this list of potential participants who met all the research criteria and invited all eight individuals to participate in the present study via an email that included a link to a Qualtrics survey. The first page of the link had an informed consent describing each segment of the study, including the survey, information about the two focus groups, and the interviews. Six participants responded affirmatively and, upon electronically consenting, continued to a second page of the survey with questions asking about their demographic information. Preferred availability for times provided in a Doodle Poll determined the group assignment for each participant.

We assigned the six participants to groups of three and conducted two online focus group sessions for each of the two groups of three participants. Using the Cisco WebEx platform, which allowed for video conferencing, recording, and transcribing, one member of the research team served as facilitator and led the focus groups while another member participated as an observer. We began each focus group with a statement explaining that the discussion would be audio and video recorded, and transcribed. Due to the nature of a focus group, confidentiality could not be guaranteed but we asked each participant to maintain the group's confidentiality. The two focus groups took approximately 90 minutes and consisted of seven and six questions respectively. Following the

initial focus group, participants had the opportunity to put into practice within their professional roles the knowledge that they constructed during the first focus group.

A second focus group took place four to six weeks after the first for each of the two groups. We reminded the participants of the audio and video recording and transcription of the focus group, and the measures we took to secure the confidentiality and privacy of participants. The second focus group followed the same CARMA matrix and allowed each of the participants the opportunity to discuss the experiences resulting from the knowledge constructed during the first focus group. One participant was unavailable to participate in the second focus group and opted to answer the focus group questions during her individual interview.

We conducted individual interviews using WebEx to construct a dialectical process one to three weeks following the second focus group. Prior to the interviews, the lead researcher read a statement to remind the participants that the interview was audio and video recorded and transcribed, and to inform the participants about the measures we took to secure the confidentiality and privacy of the individual interviews. All focus groups and individual interviews used WebEx to construct a transcript. We reviewed the recording transcripts of the focus groups and interviews. Participants also had the opportunity to review the transcripts for accuracy and clarification at each point in the present study. Regarding the analysis, we used MAX-QDA to conduct the coding from each focus group and individual interview separately for triangulation. After the completion of coding, we merged and analyzed the coding systems using the visualization functions of MAXQDA to better understand the clustering of the codes.

The implementation of a number of methods enhanced the present study's internal validity and maximized the trustworthiness of the research. From the inception of the project, members of the research team met on a weekly basis to discuss protocols, data collection, and coding. As the research progressed, the reviewers continued to meet weekly to discuss agreements and disagreements in coding, the emergence of themes, and other key findings that appeared in the data. Such a collaborative approach to data collection does not itself confirm

credibility of the findings in the data but it does increase confidence that the findings do, in fact, reflect the data that participants provided and minimizes the influence of an individual researcher's biases.

We included multiple forms of triangulation in the design of the present study (Denzin, 1970). Dividing the participants into two groups for the focus group interviews and conducting separate focus group interviews for each group several weeks apart provided data triangulation by collecting data from different groups of individuals and at different times. The multiple researchers in the focus groups and interviews provided further investigator triangulation by providing more points of view in the collection and analysis of the data. The use of taxonomic and domain analysis provided the additional layer of methodological triangulation. Following the emergence of the themes, we conducted a data audit. This audit included rereading the entirety of the focus group and interview transcripts, re-watching portions of the video recordings, and identifying those quotes which best captured the breadth and depth of the research findings.

Additionally, we received significant direction and feedback from an expert who developed CARMA, which we used to analyze our data and report our findings. This researcher expert read our analysis and confirmed that we were, in fact, maintaining the fidelity of the model and accurately reporting the data. Finally, at numerous steps in the research process, we implemented member checking (Birt et al., 2016) to strengthen the internal validity of the present study. Through member checking, we verified that we clearly understood the intent and meaning of the statements in the transcripts. Member checking also provided opportunities for the participants to clarify their meaning, confirm or correct our understanding, or expand upon their original statements to provide greater understanding of their intended statements.

While inherently small, the present study's sample accounted for three-quarters of the identified population of early career employees in the field of learning in retirement. Of the eight professionals we identified in an exhaustive search, only two were unable to participate. As such, it is our belief that we did in fact achieve

saturation, strengthening confidence that our data is representative of the population we chose to study.

Results

A domain analysis and taxonomy, provided in the appendix, led to the emergence of five themes in the focus groups and interview transcripts. These themes, as shown in Table 1, relate to the situational positioning of the participants. The five themes include: (1) the positioning of the emerging professionals within their lifelong learning institute, (2) their university, (3) their profession, (4) their professional growth, and (5) their overall professional network. Following the identification of themes, through the CARMA analysis, of which a sample is provided in the appendix, we described the themes as experienced by each of the participants including the data from both focus group sessions supplemented by the individual interview data.

Table 1
Themes: Emerging Professionals Within their Situational Positioning

Themes	Theme 1: Institute	Theme 2: University	Theme 3: Profession	Theme 4: Network for Professional Growth	Theme 5: Overall Professional Network
Realm of Socialization	Personal	Institutional	Professional	Extra- Institutional, Professional	Extra- Institutional, Professional
Keywords from Coding	Program Improve Team Staff Members	Institute Support Institution	Mentors Experience Professional Focus Connect	Osher Opportunities Network Engage Teach Community	Difficult Division Change Fit
Support	Mentors Volunteers	Inconsistent depending on placement of institute within university	Osher National Resource Center (NRC)		
Networking			Participants must create their own opportunities	Limited access to conferences limits networking	Participants must create their own opportunities
Professional Development			Limitations impede career advancement	Desire for more development for succession planning	
Expectations	Met or exceeded	Some met, some not met	Not met	Not met	Varied by individual

Within these five themes, we answered our research questions about emerging lifelong learning professionals' experiences regarding support, networking opportunities, and professional development through our participants' initial expectations. The structure of the subsections below is divided by each theme connected with their realm, research questions, and illustrated with quotes of the participants drawn from the focus groups and interviews. The first theme, positioning within the institute, corresponded with the personal realm of professional identity; positioning within the university corresponded to the institutional realm; and the third theme, positioning within the profession, corresponded to the professional realm. The fourth and fifth themes, positioning within the network for professional growth and positioning within the overall professional network, both corresponded to the extra-institutional and professional realms (Hirt & Creamer, 1998).

Theme 1: Emerging Professionals Within Their Lifelong Learning Institute

The first theme, which aligns closely with the personal realm of socialization for higher education administrators (Hirt & Creamer, 1998), was the positioning of the emerging professionals within their institutes. It was within the institutes that the participants spoke most uniformly about the support that they were receiving as they moved into their careers. One key area of agreement among the participants was the support that they received from their mentors. For example, Erica described the ways in which her director as mentor provided friendship as well as acceptance and confirmation, classified as Kram's (1983) mentoring functions, but she did not receive the same level of support from the rest of the staff. She shared:

> It's been a wonderful experience to have this support and the love of a mentor within my institution. Somebody who celebrates what I do and is always willing to listen to ideas that I have, or to talk through difficulties […] As for the rest of our staff, I don't really receive support from them. I will ask them to do things, but they do not exhibit a spirit of, like, collaboration. Like, "How can I help and jump in and support you?" which is in some parts

just the structure of the way that the institute has been.

Theresa also described her mentor and several of the mentoring functions identified by Kram (1983), including coaching ("what books I should read"), exposure and visibility ("works to empower us"), and challenging assignments ("try new things and learn new things").

Additionally, Theresa indicated she had significant support from within the institute and university departments outside of the division in which her institute is housed. She said:

> I receive a lot of support from our director here...I was really dedicated, really excited to become program coordinator...We've gone through a lot, but that support has been great. Our team is wonderful at customer service and our student assistants are great. We also get great support from the university foundation who help us fundraise...They have a great team and they're wonderful to our volunteers and our members...They've taken time to understand our program and our members.

Likewise, Anna described the support that she received from her mentor as well as the mentoring functions (Kram, 1983) of protection ("having your back") and coaching ("trying to guide you into the right way"). She also challenged Kram's (1983) assumption that mentoring relationships are usually expected to be formed between a young adult in early career and a more mature one, which was not her case.

Moreover, the emerging professionals received considerable support from and heavy reliance on volunteers within their programs. Participants described the most significant volunteers as those volunteers who had either the deepest commitment to their programs or came from other areas and wanted to replicate what they had found elsewhere. All of the participants identified volunteer management as a significant portion of their role, regardless of title and job description. For example, Mary described her reliance on volunteers at her original institute, sharing:

> We really had to draw on volunteer support. So, I had a lot of support from our executive advisory committee members...It took a lot for me to trust that when volunteers said that they

would do something that they would do it, just because I think if you're a one woman show, it takes a lot in order to handover something.

The participants experienced the most direct support within the first theme, the emerging professional within the institute, where their mentors helped them to develop their zones of proximal development (ZPD) in the field of learning in retirement (Vygotsky, 1978).

The support that Mary experienced from her volunteers exceeded her expectations. Similarly, Erica, Anna, and Theresa received support from their mentors that exceeded their pre-professional expectations. Of all the themes represented, this first theme was the one in which the experiences of the participants were the most congruent.

Theme 2: Emerging Professionals Within Their University

Within their institutes, the emerging professionals received considerable support from their supervisors, mentors, and volunteers to develop their ZPDs that exceeded their expectations (Vygotsky, 1978). In some cases, participants expressed strong support for their institute from university departments within the division where the institute is housed as well. As Sharon, from a state university in the mid-Atlantic, pointed out:

> So, we are housed in the division of strategic partnerships and research within the university. We are really lucky, I think, to be housed in that division because that division has its own administration and finance department, partnerships and outreach staff, marketing staff, so that really helps us. I've heard it said, "When one Osher succeeds, we all succeed," which is very true.

Sharon experienced a strong relationship between her institute and the other units within the division in which it is housed, creating a feeling of connectedness between the institute and the university as a whole, exceeding her expectations.

However, participants did not perceive the same level of support within their university outside of their immediate unit. For example, Mary was surprised by a lack of support from her division and college faculty. She stated: "I

really expected, perhaps naively, that I was going to be embraced with open arms by the faculty, right? And that really wasn't the case. I'm not exactly sure what faculty members saw that might be off putting." Like Mary, who found faculty support fell short of her expectations, Theresa and Anna also felt the same. Theresa told Sharon that she was jealous of her level of support from university departments within her division, feeling that there was more of a culture of competition for resources than a culture of collaboration at her university. Theresa described a disinterest of certain departments to serve the OLLI program:

> We kind of take a back seat to the other [departments] so that has been difficult. I take a lot of the marketing on myself. I take a lot of the planning on myself. A lot of the customer service falls back to our team.

Likewise, Anna expressed resentment toward her institute from other departments. Like Theresa, she expressed a bias within the university to support more traditional undergraduate and career focused programs. Anna implied that there was a perception that OLLI took classroom space that would be better utilized in support of more traditional student programs. She stated:

> OLLI is still not known within the campus…Since the focus for the university is undergraduate students, there's not much push for OLLI…It's frustrating at times, you know, like finding those classroom spaces. Especially we have classroom space specifically for all that our members use. But then when we have fitness classes for them, we have to have a good setup for them, and we try to use our university fitness center. And sometimes they don't have room [for our members].

Support and connectedness varied by the positioning of the institute within the university. The participants working in institutes that were housed in UCEs described less supportive environments than those institutes that were housed in other areas.

While Sharon reported a high level of connectedness within the division where her institution was housed, Mary, Anna, and Theresa expressed frustration and even alienation from

other departments, from faculty, and from support services that prioritized resources toward career preparatory and tradition programs (Gaskill, 2001, 2002). The disparity of connectedness was consistent with the institutional realm described by Hirt and Creamer (1998). Henceforth, participants experienced different ways of support within their university and staff which impacts the cognitive perceptions and the experiences of their development (Vygotsky, 1978) in the field of learning in retirement.

Theme 3: Emerging Professionals Within Their Profession

Participants also struggled to build and maintain connections with other professionals who work in learning in retirement at their institute, universities, and overall Osher network. Much of the success that professionals experienced in the area of networking was very personal. Erica, for example, thrived on networking. For her, the opportunity to network with faculty at her university and other universities who are not just working as practitioners, but also as researchers, was crucial. The conversations that took place were natural with colleagues discussing shared work and research interests. Erica leveraged her perezhivanie (Vygotsky, 1978) with the platform Zoom to engage in a lot of networking spaces across the nation. She shared:

> I am a networking nut. It is like my air. So, I really appreciate networking, and I'll keep it specific to the opportunities that I have through my institute. So, I think a major one for me is the opportunity to network with faculty at my university and other universities who are researching older adults and having conversations about what it means to be an older adult because we immediately have something in common.

Among the participants, both Erica and Theresa are well-known, have presented at multiple conferences, and have sought ways to collaborate between each other and among others. Additionally, they both have well-defined mentoring relationships with the potential to enhance their career network opportunities and psychosocial development which in turn brings greater levels of career satisfaction and learning goals (Fagenson, 1989; Kram, 1983). This networking

is of particular importance for professional acculturation and socialization for Erica and Theresa to make up for the lack of a traditional post-secondary preparation for their chosen career path, necessitating an alternative route to such opportunities for socialization that this mentoring can create (Kram, 1983; Richards et al., 2016; Wilcoxon et al., 2010).

Other participants, however, spoke of feeling very isolated and starting from scratch. Bonnie, for example, described really struggling, expressing that she really did not even know where to look for such opportunities, and implied that participating in the focus group was perhaps her first opportunity for professional networking at this scale. She stated:

> While I think it's great that the Osher Foundation allows everyone to run their own institute and do things differently, I find it very difficult that there's not one manual or set of rules [as a starting point from which] we're allowed to branch off. If I didn't meet you guys today, like, I'm already planning, how I can reach out to both of you about things that I want to talk to you about, like, if there was some, you know, directors guide or like a meeting where you can meet other young professionals, that would be fantastic.

Sharon spoke positively of a small group discussion in which she participated and expressed a desire for more such opportunities.

Particularly, Sharon described an absence of opportunities for professional development for Osher staff below the director level. In her perception, lower-level staff on the national level have less opportunity for professional development than directors, and certainly they have less opportunities than she had expected. She shared:

> As someone who's not a director, I know that there are certain things that are done for directors specifically, which I absolutely understand. It's also like there's a club that I'm not a part of. I'm a member of the country club, but not the elite, you know, and it's like, how do we [non-directors] have our own separate discussions about what it's like to be someone supporting the director, and what are ways that you're

supporting your director that maybe I haven't even thought of, you know, that I could use to help my organization be as successful as it can be.

Participants perceived limitations in professional development opportunities to impede career mobility and advancement. While they were satisfied with the professional development that they received, participants anticipated that more would be available. By creating opportunities for networking and training, targeting early career professionals can facilitate a greater connection to the field of early retirement in the professional realm (Hirt & Creamer, 1998) and better develop professionals' zones of proximal development (Vygotsky, 1978).

Theme 4: Emerging Professionals Within Their Network for Professional Growth

In a field without a traditional path to professional socialization, the participants described challenges in building their network with individuals inside and outside of the Osher network, and its impact on understanding their paths towards career advancement. Bonnie expressed frustration with a lack of professional socialization (Richards et al., 2016) since her mentors are much more familiar with the university than with the field of learning in retirement. Further, this lack of networking opportunities inhibited her ability to offer the mentoring functions of challenging assignments and sponsorship as a mentor to her own direct report (Kram, 1983). She shared:

My member relations person asks me all the time, "What's next for me?" […] And I feel like, you always have to have that next step of where you're aspiring to lead into, so I want to keep her motivated. But I don't know if there is a title change or a raise or something. What's next for her in her career ladder? So those are some things that I think would be great with an advisory from Osher about.

Bonnie expressed her lack of mentoring on networking opportunities revealing she is potentially entering the separation phase (Kram, 1983). She noted that her mentor has provided the level of sponsorship and other career development functions up to the point to which she is able and the gap in the ZPD has closed since

her mentor can no longer contribute to her knowledge beyond this point in this area (Vygotsky, 1978). As a result, networking is necessary for Bonnie in order to find a mentor who is better socialized in the profession of learning in retirement (Richards et al., 2016), and in order to continue furthering her career in this field.

Theresa and Erica expressed a desire for greater opportunities for networking and collaboration between colleagues within the institutes, but also a shared frustration of limited access to conferencing, and a lack of virtual and in-person networking events. They have found ways to mitigate the absence of these opportunities during the cultivation phase of mentoring (Kram, 1983) such as finding opportunities to attend and present at conferences and virtual forums. They discussed the following:

Theresa: Again, the only thing I would change would be more opportunities within the Osher network for people to talk…We all could have been collaborating and giving each other the material and helping or maybe I already solved something.

Erica: I want to facilitat[e] conversations, not only with my university, but with universities across the nation…I am working on developing another learning conference specifically for people in the older adult space.

While Theresa and Erica spoke about more formal opportunities, Anna discussed just reaching out one-on-one to other OLLI professionals to collaborate. She has found that, since her role is marginalized and not understood at her university, she must find ways to connect with people in more similar positions if she is going to continue to grow as a professional in the field. Specifically, she has been seeking out people in similar roles that are close to her in age. She stated:

[I have] been reaching out to other OLLI, [asking] "What do you guys do about this and this and that?"… I will feel comfortable doing that. And before I would have just asked my boss, you know. But it's good to have that relationship because there's so many ways of doing things in OLLI.

The overall support received from the Osher Network has met the expectations of the

participants. However, one area that fell short of expectations is professional development with an emphasis toward succession planning. This lack of succession planning resources was best exemplified by Sharon's explanation:

> My director is wonderful and she's really good at what she does, but...she is almost always in a constant state of being overwhelmed with the amount of work that she has to do...I wish I was trained on things that she [does...b]ecause while there are a lot of moving pieces that I take care of, that she doesn't know how to do at all...If I had a greater understanding of everything that she did as well. And I, I think that would give our members some comfort as well.

In the absence of traditional academic preparation and professional organizations, the succession planning professional development lacks infrastructure within this profession, potentially impeding advancement. However, Erica shared ideas and opportunities to interact at the grassroots level that could help to mitigate some of Sharon's concerns and challenges. Nevertheless, more formal professional development is needed to promote professional socialization within the field (Richards et al., 2016).

Theme 5: Emerging Professionals Within Their Overall Professional Network

The Osher NRC fulfills much of the need for professional socialization in the field of learning in retirement. However, the participants shared the ways in which they looked beyond the traditional sources of professional socialization to support the professional and extra-institutional realms (Hirt & Creamer, 1998; Richards et al., 2016) to continue to build their overall professional networking relationships. While the examples provided in the focus groups and interviews were widespread, the fact that the professionals all sought such connections was universal.

While Erica recognized the commonality she shares with faculty researching older adults, she also understands, although struggles with, her relationship with her institute membership. Erica's struggle is not a hostility or an uneasiness in working with the population, but rather with establishing her own boundaries in

recognizing that she is, by her age, an outsider. While she has their best interests at heart, Erica is committed to recognizing that she is not in a position to speak on her members' behalf. She said:

> I think I, I'm still lacking a lot of situational positioning and in that, I mean, that I feel like, on the day-to-day, I have the space and the ability to make a lot of decisions on behalf of older adults of which I am not one. And I think that's important...To engage them in that process of creation and to not to [sic] remind myself not to speak on behalf of our members and to make decisions on their behalf without engaging.

In her case, Erica sought connections by reaching out to professionals in other disciplines to understand better the clientele with whom she works.

Where information within the field is limited, Erica has reached out to academics who study the population with whom she works. Erica disclosed that she entered the field in part because it is still establishing, which she described as a double-edged sword:

> That older-adult education as a career trajectory isn't really a thing people talk about or write about or think about as a thing. But, on the other hand, it means that the young professionals seeking something to be passionate about have a lot of space to grow it into their own. And that's kind of why I latched onto it was because I saw that I, I could have, I could use my gifts to really kind of create a lot of change without having all of that bureaucracy and red tape that goes along with so many other fields. That is just really steeped in literature, theory, and research.

While Erica took an academic approach, Mary sought understanding through a multicultural lens. During her transition between institutes, Mary traveled abroad in part to better understand the cultural approaches to aging. In Japan, she observed a significant contrast:

> You know I have a real strong, strong interest in Asia, particularly in Japan, and I really love how their older adult populations thrive and create communities and how different they are in

radical and huge ways than our West-
ern way of approaching age, and, and
all of the things that go with that not
that they also don't have their own so-
cial problems they do, but there's just
a night and day difference between the
way that older adults are viewed and
seen and treated [between here and]
places like Japan.

Erica and Mary adopted a strategy to better
view their institutes in a global context. Oth-
er participants sought a more detail focused ap-
proach to the immediate needs of their institute.

Two other emerging professionals, Theresa
and Bonnie, took advantage of their focus group
participation to create their own mini network
for problem solving. During the individual in-
terviews, the two disclosed that they had be-
gun working together and collaborating across
the country to share their work, troubleshoot is-
sues, and share ideas. Bonnie also spoke of the
conversation that led to her and Theresa begin-
ning to share information between their two in-
stitutes. She shared:

I was talking to Theresa about how a
lot of us end up doing the same work.
Right? So, if you're putting togeth-
er a PowerPoint about, what is OLLI,
it should be somewhere where we can
all go. And download this template of
what is OLLI and then plug in our own
specific city, numbers, and pictures. In-
stead, I spend hours every semester,
creating a flyer where there could be a
template for what is OLLI? How much
does it cost? What are the benefits?

Each participant had their perezhivanie or a dif-
ferent set of collective experiences (Vygotsky,
1978) to seek opportunities for networking
and professional development in the extra-in-
stitutional and the professional realms (Hirt &
Creamer, 1998). Mary traveled abroad to un-
derstand better an approach to aging popula-
tions in an Asian culture, Erica sought out ac-
ademic research and built relationships with
academics researching the senior population in
the United States, and Bonnie and Theresa cre-
ated their own system of sharing information
and templates to better serve their institutes
and grow their careers. In all these cases, the
lack of a clear career trajectory and a process of

socialization into the profession left a vacuum
that participants were looking for ways to fill.

Discussion

In the current study, we found that the in-
sights provided by the six emerging profession-
als helped us to validate that, despite the new-
ness of the profession of learning in retirement,
the isolated experiences of the participants is
consistent with the four professional realms
that Hirt and Creamer (1998) described. Fur-
ther, the CARMA methodology implemented
in the present research prompted us to analyze
and interpret the qualitative data by comparing
the participants' perceived reality of their expe-
riences against their actual described experienc-
es from a Vygotskyan perspective (1978). Re-
garding support, our participants experienced
strong support within their institutes from their
mentors (Kram, 1983) and volunteers with-
in their programs which met or exceeded their
initial expectations. This support can be built
upon by ensuring strong support from leaders
and empowering OLLI directors and their super-
visors to provide adequate training, mentoring,
and support to their hires and direct reports. We
also need to recognize that volunteer support
may exceed university support and we need to
develop techniques to prevent this disparity in
support from leading to further de-profession-
alization and weakening the perception of life-
long learning professionals (Peterson, 2006).

A supportive environment existed within
the institutes but, within their respective uni-
versities, support varied based upon the units
in which the institutes are housed. In order to
address this inconsistency, leaders in this field
should assess placement of institutes with-
in universities for trends and impacts on staff
and program development. Additionally, these
leaders could better communicate whom they
serve in lifelong learning institutes to potential
employees and the university as a whole and
improve communication and compliance with
the university in general toward short and long-
term planning for the institute. Perhaps most
importantly, we should encourage a collabora-
tive approach and attitude that by aligning each
institute directly to the priorities of its universi-
ty's leadership, the success of the lifelong learn-
ing institute enhances the university. We must
articulate more clearly who is served in lifelong
learning institutes to potential employees and

universities as a whole. Finally, we need to encourage a collaborative approach and attitude that when OLLI succeeds, the university/division/college succeeds.

While participants within the Osher Network perceived support to be adequate, those professionals who are seeking a career in learning in retirement still face a significant lack of industry-specific networking or professional development opportunities. Since the participants' initial expectations of the availability of networking opportunities were not met, some participants decided to create their own opportunities for networking with other professionals inside and outside of the field in learning and retirement. These self-created opportunities helped to mitigate the lack of traditional avenues for professional socialization within their chosen career path (Kram, 1983; Richards et al., 2016; Wilcoxon et al., 2010).

Further, the mentoring functions that supervisors, directors, and volunteers provided mitigated the lack of formal socialization opportunities available to these emerging professionals (Kram, 1983). Participants also perceived limitations in professional development opportunities that impede career mobility and advancement (Hirt & Creamer, 1998) exemplifying their initial expectations that more professional development opportunities would be available. Overall, participants shared different ways to seek institutional and extra-institutional sources of professional socialization to continue to build their networking relationships and to develop their professional development in the area of learning in retirement. It is necessary to create opportunities specifically designed for mid-level institute professionals toward both institute management and career planning, and to expand professional development beyond specific skill building toward broader needs of institute leadership. The creation of these opportunities will enable emerging professionals to better serve their institute and university leadership, as well as to expand their opportunities to grow professionally within the field. Those professionals who are already creating their own networking and professional development opportunities may become leaders in this effort.

Limitations and Future Research

Examining the experiences of emerging professionals in a relatively new profession may be beneficial to understanding the experiences of such professionals in this field and in others. The findings of this exploratory multiple case study can facilitate a greater system of support for emerging professionals in the field, including professional development, succession planning, and greater opportunities to network. These benefits could contribute to current and future professionals, as well as the current and future generations of learning in retirement institute members. The present study could also help OLLI directors and other university administrators who supervise employees similar to those professionals included in the research to appropriately mentor and support them in their professional endeavors, as well as lead to future research.

The limitations of the present study include the small sample size because, while the six participants were selected from only eight individuals nationwide who met the conditions of the study, the study results may not be generalizable. Further, the experiences of the participants may differ significantly from other learning in retirement professionals who serve in higher-level positions, lower-level positions, or have come to the profession as a second or even a third career. Finally, while Kram (1983) identified the four phases of a mentoring relationship, a gap remains regarding the drive to seek a mentor and the drive to be a mentor prior to initiating such a mentoring relationship. The present research did not address this gap, nor did it provide a greater understanding of why certain participants had stronger mentoring relationships than others because it was outside of the scope of this study. These limitations may be addressed moving forward by more expansive research on professionals in the field.

Future areas of research may include, first, a telling case study of participants identified within the present study, as well as a case study of the institute directors who are in positions similar to those directors that supervise the participants in this study. Such future research will give a broader perspective, identify why some disparities and similarities occur, and provide greater direction for those directors who mentor entering professionals that could better promote professional socialization and learning. Finally, a larger scale study of all personnel in such institutes could examine overall levels of support

within the university for learning in retirement professionals. Such an expansive understanding could help create knowledge that would allow the development of clear paths for career advancement and succession planning, greater opportunities for collaboration and networking, and expanded opportunities for cross-institute mentoring among professionals in the field.

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APPENDIX

This appendix includes excerpts of the domain analysis, taxonomy, and CARMA matrix in order to demonstrate and disclose a portion of the data analysis process.

Domain Analysis - Excerpt

Within the University	Is a type of	Situational Positioning
Within the Profession		
Within the Lifelong Learning Institute		
Within the Network		
Within the Support System		
Mentor	Is a part of	Support System
Friends		
Volunteers		
Co-workers		
Isolation	Is a type of	Challenges
Lack of standardization		
Limited opportunities to network		
Lack of support		
University bureaucracy		
Mentor	Is a part of	Network
Faculty on campus		
Colleagues on campus		
Colleagues everywhere		
Researchers on campus		
Researchers everywhere		
Boss		

Taxonomy - Excerpt

Situational Positioning Within				
Institute	**University**	**Profession**	**Network**	**Support System**
Members	Institute	Network	Relationship	Difficult
Team, staff	Support	Conference	Structure	Division
Program	Institution	Opportunities	Coordinator	Expectations
New	Housed	Experience	NRC	Change
Felt, Feel	Succeed	Develop	Professional Development Conference	Fit
Different	Older adults	Interests	Mentorship	Isolated
Learn	Education	Connect	Position	Achieve
Improve	Active adults	Focus	Teach	Goals
Full time staff	Moving forward	Osher	Involve	
relations	Lifelong learning spaces	Professional	Career	
database		Mentors	School	
community		Ideal Mentoring relationship	New People	
		Focus group meetings	Different Experiences	
			Great Resource	

CARMA Matrix - Excerpt

CARMA Matrix Emerging Professionals in the Field of Learning In Retirement.

Users/ Participants	1 Program/ Community/ Classroom Expectations The expected experience among emerging professionals NoteTaking (Ideal)	2 Evident Implementation The actual lived experience of the emerging professionals NoteTaking (Actual)	3 Results Comparison and contrasting of the expected and actual experiences NoteMaking	4 Conclusions/ Recommendations Researcher findings and recommendations NoteReMaking
Role	**Theresa** Knew what I was getting into because I had just left being a student assistant. I wanted to work with older adults. I love lifelong learning. Everything can always continue to be improved. **Bonnie** And to be honest with you, I didn't know what my expectations were. It was very eye opening to see how active older adults in the program were. I think there's room for improvement and I think communication between the staff myself and our members I think that would be something I'd love to see improved upon [and …] on the understanding of university policies in coordination with the OSHER policies.	**Theresa** Small team grew as membership grew causing need for restructure. So, my role kind of grew so much, we split into two and, and I think it's becoming better. I think it's going to take a little bit of time to. Merged job and unmerge it and take parts apart and put it into two different positions. **Bonnie** So, we have a small staff. It's just myself and our member relations assistant. We previously had an assistant program manager, but she retired after eighteen years with the program. So, that just happened a few weeks ago. So, we were always a small team of two. Then we just brought on our member relations assistant and then we lost our assistant program manager. So, we're still a team of two, but it seems to be going really well.	**Theresa** Roles adapt and evolve. As institute's grow, and positions are added, it is difficult to determine how to assign the various duties as there is so much variation among institutes and staffing structures. **Bonnie** Surprised by how active the older adults are. Challenging to work with such a small team. Room for improvement on communication and compliance with university policies.	**Theresa** Provide a collection of job descriptions and organizational charts across the LLI network; create opportunities for networking among similarly situated professionals. **Bonnie** Better communicate who is served in LLI to potential employees and university as a whole and improve communication and compliance with university in general.

	Erica I get to make a lot of decisions on behalf of our institution, which I find really beneficial, and it fits that I enjoy working. I guess in in ways, I have expectations, but my role will continuously increase the efficiency of our program and continuously grow our program's reach and membership, and sometimes I'm not able to do that and then how it could be improved. **Mary** So, it was hard to have expectations. I'm really, kinda got to the point where I didn't have any. It was just keep this alive, keep it growing, keep people engaged and interested and then you'll figure it out and in that process. For me personally, there's much better morale if lifelong learning programs are housed in an academic setting, much more so than alumni and fundraising. **Sharon** Okay. So, my background, like, my bachelor's degree is in gerontology, which is the study of how people age. So, I knew, you know, going through undergrad that I wanted to work with older people, but I wasn't entirely sure in what capacity.	**Erica** I probably play the largest role in both day to day and long-term planning with more specificity on logistically, how to get things done. So, I am responsible for ensuring that things get done and that they are successful. I, I'm really fortunate that I have a lot of say in terms of how I structure what I do what I, what I do and how I do it. I get to make a lot of decisions on behalf of our institution. **Mary** […] because I felt bounced around so much in the end. I landed in the advancement office, but it was very much a hands-off kind of thing. And I just ran the program, which, as you said, Erica, it kind of fits the way that I work, you know, kind of set my tasks and goals and schedules and things like that. So, I made it work, but it did make it a little bit difficult to have any kind of long-term planning because the school itself didn't really have any long-term planning or for the program. **Sharon** The term membership coordinator is kind of like an umbrella term because I don't only deal with membership role is very much customer service based; I deal a lot with database management registration issues. This is made up of some of the most active older adults I've ever seen in my life, and they are me every day. So, I think that that has just exceeded my expectations because in college, a lot of what you learned about is the decline not so much the positives, but more just the natural progression of the lifecycle.	**Erica** Roles responsible for the daily functionality of the institute, communication with the university and there is an expectation of continual growth and improvement. Expected to plan based on current needs as well as an expectation that the program will more efficiently reach more and more participants. **Mary** Situation of the institute within the university has brought implications for the morale of the staff and consistency in programming. Lack of certainty of the program inhibits long-term planning. Positioning in an academic program is a better fit for the institute than advancement or other financially focused organizations within the Institutes of Higher Education. **Sharon** For a gerontologist, LLIs challenge preconceived notions of who we serve and how we serve them because the participants in OLLI are much more active than those seniors served in other environments.	**Erica** Improve communication and compliance with university in general toward short- and long-term planning for the institute. **Mary** Assess placement of institutes within universities for trends and impacts on staff and program development. **Sharon** Better communicate who is served in LLI to potential employees and the university as a whole.