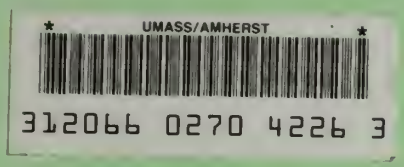

Older Learners in Higher Education: Their Motivations, Barriers, and Expectations

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Acknowledgments

The Gerontology Institute and Center at the University of Massachusetts Boston (UMB) was a natural setting for this study on older learners in higher education. After all, older learners have been finding their way to gerontology at UMB for the past 20 years. Prior surveys of the gerontology certificate program revealed great satisfaction by the students and documented their many contributions to the community (Gerontology Institute, 1996). Gerontology at UMB is a living laboratory of productive aging. What was not known at the onset of this study, however, was the extent to which older learners had a presence in the university-wide curriculum and degree programs. Since the elderly, like all other age groups, are heterogeneous, it made sense that academic interests would span the entire university. This hunch became the starting point for our exploration.

There were many individuals who contributed to the formulation and implementation of this research effort. The Spring 1999 action-research project was led by Nina M. Silverstein, Ph.D., with research and teaching assistance from Gerontology doctoral student Jay Bulot and doctoral candidate Lona Choi. An advisory board was recruited to assist with the formulation and modification of research questions and later to provide some insight toward the interpretation and implications of findings. The individuals who served on the advisory board were: Francis G. Caro, Director, Gerontology Institute, UMB; Marcy Crowley, UMB retiree; Sandra Kanter, Ed.D., Graduate School of Education, UMB; Marie Kennedy, Careers' Centerhead, College of Public and Community Service, UMB; Barbara Kirchheimer, UMB alumna; Cathy Livingston, Ph.D., educator; Kay Maguire, UMB alumna; Marguerite McLellan, Office of Sponsored Projects; Grace McSorley, Associate Director, UMB Advising Center; Diane Pyle, Gerontology Certificate and Undergraduate Program Administrator, UMB; Mary St. Jean, Gerontology Center Administrative Assistant and UMB alumna; Sabrina Taruilli-Hughes, Enrollment Management Officer, College of Public and Community Service, UMB; and Charlotte Yacker, UMB alumna. Advisory board member Francis G. Caro was particularly helpful in providing substantive background for the project by serving as a guest lecturer during February 1999 and sharing his expertise in productive aging.

The acquisition of the study population was greatly assisted by Cheryl Liberatore, Office of the Registrar, UMB, and Madison Thompson, Director of Affirmative Action, UMB. The questionnaire was designed and implemented by the Spring 1999 action-research class offered through the Frank J. Manning Certificate in Gerontology Program within the College of Public and Community Service, University of Massachusetts Boston. The project was approved by the Gerontology Institute's Human Subjects Review Committee under the direction of Barbara Formaniack Turner, Ph.D. Project Director Nina Silverstein and research and teaching assistants Jay Bulot and Lona Choi supervised the research effort. Mr. Bulot was a strong contributor to the design and formatting of the survey instrument. He also was responsible for data processing and preliminary analysis. In addition to her teaching assistance, Ms. Choi contributed greatly to dissemination of the findings at national gerontology conferences and to manuscript preparation.

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Cole, Katherine Erat, Mollie Feeney, Natalie Fultz, Ruth Grillo, Shirley Jacobs, Mary McCarthy, A. Robert Philips, Renee Summers, Audrey Uchill, Arlene Wolk, and Milton Wolk assisted with supervisory and administrative tasks during data collection. Diane Pyle, Manning Certificate and Undergraduate Gerontology Program Administrator, and Mary St. Jean, Gerontology Center administrative assistant, provided continued support throughout the project's duration. Sue Reamer, Ed.D., reviewed an earlier draft of the manuscript. Francis G. Caro, Ph.D., and Robert Geary reviewed and edited the final manuscript. The following students, as members of the action-research class, committed their weekends during April 1999 to conducting telephone interviews with older learners in a supervised phone bank setting at the Gerontology Institute:

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Executive Summary

Who are the older learners on campus? What are their motivations for pursuing higher education? What obstacles do they face? And what do they intend to do upon completion of their course of study? These are some of the questions that were explored by gerontology students in an action-research study of older learners enrolled at the University of Massachusetts Boston (UMB) in Fall 1998. UMB offers undergraduate and graduate programs in approximately 90 fields of study, as well as advanced certificate programs. The University had an enrollment of 12,499 students in Fall 1998 (OIRP, 2000). Over 1000 students age 50 or older were registered in courses at that time.

Over the past 20 years, there has been a steady increase in the number of older learners enrolling in America's colleges and universities. In fact, since the 1970s older students have become the fastest growing population on the college campus. Today, non-traditional age students make up approximately 25% of all students on campus. For students over the age of 40, this represents an increase of over 235% (Zernike, 1999). Yet, limited research has been conducted in recent years on this population (Covey, 1981, 1982, 1983; Hiemstra, 1976; Graney & Hays, 1976). This report begins to address that gap by providing insight into the perceptions of older learners regarding their motivations for enrolling in institutions of higher education, the barriers they face, and their post-educational expectations. The objectives of this study were to: understand the motivations for pursuing higher education and barriers faced by students age 50+; gain further insight into the older learners' experiences on campus; and develop recommendations for colleges and universities to heighten their awareness of the needs and expectations of older learners.

The partners for this project included representatives from the Gerontology Institute, the administration of the University of Massachusetts Boston, faculty from the Graduate School of Education, and older learners themselves. In Spring 1999, 41 students (the majority age 60+) in the Frank J. Manning Certificate in Gerontology program contributed to the questionnaire design and committed a total of 16 hours of phone interviewing in a supervised phone bank setting at UMB. Non-respondents to the telephone survey were given the opportunity to complete a paper version of the questionnaire by mail. A total of 504 interviews were completed.

The respondents ranged in age from 52 to 87 years with a mean age of 59 years. There were almost twice as many older learners between 50-59 years of age as were 60+ years of age. The majority of students were white (81%) and female (63%). Sixty percent of the older learners were college graduates. One-third of the respondents had previously been enrolled in classes within the past five years. In contrast, an equal number of respondents had been out of school for more than 20 years. Respondents were enrolled in courses and programs throughout the UMB campus. Almost half of the older learners were enrolled in undergraduate programs (48%), whereas 33% were enrolled in master's programs, 8% were in doctoral programs, and about 9% were enrolled in certificate programs.

Why did they enroll? The three overall motivational factors mentioned by respondents were: "gaining self-confidence," "meeting new people," and "keeping from being bored." However, for the learners age 50-59, instrumental reasons (skill-building) such as "career

advancement," "new directions," and "looking for another job" were significantly related to their younger age. For those learners age 60+, expressive reasons (for the sake of learning) such as: becoming a "more informed person," "keeping [one's] mind active," "joy of learning," and "something I always wanted to do" were all significantly related to their age.

University of Massachusetts Boston, like other state institutions, offers several tuition and fee waiver programs. The "Senior Waiver" is available specifically to individuals age 60+. Whether or not the tuition and fee waiver was an enrollment factor for the older learners in this study was significantly related to their age. Seventy-five percent of those respondents who were age 50-59 years noted that waivers were an incentive, but for those age 60+, the percentage rose to 87%.

Students reported that they encountered three major obstacles while attending classes: family obligations, times of course offerings, and the demands of homework. Other obstacles were found to be more age specific. For example, "difficulty scheduling appointments with professors" was a significant factor reported by those age 50-59; while "caring for (grand)children" was a significant barrier noted by those age 60+. It was hypothesized that the design and condition of the physical plant might be a barrier to the older learner. What was found, however, was that the older learner tended to look beyond these factors to their interest in the classroom subject matter and their relationships to faculty and other students. The responses to open-ended questions were particularly poignant as one student, who was a Vietnamese former POW, stated—"You have to understand that we are happy to be at a University to study, the condition of the building is not important."

Productive aging is a major research emphasis of the UMB Gerontology Institute. In focusing on employment and volunteer outcomes, the results of this research project contribute to shedding the myth of older adults being retired and out of the workforce. After completing courses at UMB, respondents age 50-59 were more likely to state that they would be pursuing or continuing full-time employment, whereas respondents age 60+ reported that they would be pursuing part-time employment and/or seeking volunteer positions.

Gaining insight into the perceptions of older learners is a positive step toward making campuses more "older-learner-friendly." The major recommendation from this study is for universities to develop standing committees on older learners. Such committees would be well-positioned to heighten the awareness of faculty and administrators to the needs and expectations of older learners, as well as to take action steps toward enhancing the learning experience.

INTRODUCTION

Over the past 20 years, there has been a steady increase in the number of older learners enrolling in America's colleges and universities. In fact, since the 1970s older students have become the fastest growing population on the college campus. Today, non-traditional age students make up approximately 25% of all students on campus. For students over the age of 40, this represents an increase of over 235% (Zernike, 1999). Yet, limited research has been conducted in recent years on this population (Covey, 1981, 1982, 1983; Hiemstra, 1976; Graney & Hays, 1976).

This report provides insight on the perceptions of older learners regarding their motivations for enrolling in institutions of higher education, the barriers they face, and their post-educational expectations. The objectives of this study were to: understand the motivations for pursuing higher education and barriers faced by students age 50+; gain further insight into the older learners' experiences on campus; and develop recommendations for colleges and universities to heighten their awareness of the needs and expectations of older learners.

BACKGROUND

Moyer and Lago (1987) suggest that the greatest barrier to higher education facing older learners today is the rising cost of tuition. While this is true for many individuals, older learners may be more vulnerable to the rising cost of tuition since many are on fixed incomes in retirement. Fortunately for residents in Massachusetts and true for 47 other states, the state legislature has enacted a Senior Tuition Waiver program for individuals age 60+ (Cross, 1977; Romaniuk, 1982). However, there still remains other supplemental costs incurred by enrolling in courses. Aside from financial barriers, there may be obstacles that arise with the institution itself, such as the physical design of the campus, parking shortages, and disability access. Other barriers to higher education classified by Cross (1977) include dispositional and situational barriers. Situational barriers are those that exist from one's situation in life such as caring for family members or work responsibility, and dispositional barriers relate to the individual's abilities and attitudes toward him or herself as a learner.

Motivation for older adults to enroll in higher education has previously been categorized as either *Instrumental* or *Expressive* (Hiemstra, 1976; O'Conner, 1987; Romaniuk & Romaniuk, 1982). "Instrumental" reasons are similar to those related to career or skill building, whereas "expressive" reasons are associated with personal satisfaction in the act of learning. Previous studies report that older learners cite many expressive reasons for enrolling in higher education

(Hiemstra, 1976; O'Conner, 1987; Perkins and Robertson-Tchabo, 1981; Romaniuk & Romaniuk, 1982). Motivations range from "it's something I've always wanted to do" to "I needed it for a promotion." However, the intrinsic motivation for enrolling remains to be realized. In their review of seniors' educational motives, Manheimer, Snodgrass, and Moskow-McKenzie (1995) suggest that it is more likely that older learners have both instrumental and expressive needs. They state that,

> *Seniors exhibit a wide diversity of needs, interests, and wants that may be conditioned by socioeconomic and educational backgrounds, institutional settings where programs are offered, and existence or availability of opportunities. (p.23)*

There is overwhelming evidence in the literature that the most common reasons for older adults to enroll in higher education are cognitive interest and a desire to learn (Daniel, Templin, & Shearon, 1977). Other reasons given in the literature for participation in higher education were "seeking intellectual stimulation" (Perkins & Robertson-Tchabo, 1981), "learning for the sake of learning" (Covey, 1980), and a simple desire for more education (Kingston, 1982). It is clear from the literature of the 1970s and 1980s that expressive motivations represent the larger reason for enrolling. However, what appear to be missing are more instrumental reasons for continuing in higher education. Recent research suggests that an emerging number of older adults are enrolling in higher education solely for career related objectives (Scala, 1996). According to Lowy and O'Connor (1986), education increases the number of work and employment opportunities for older learners, helping them continue to play an active role in society. Scala (1996) hypothesized that as older adults remain in the workforce longer there will be an increasing number enrolling for more instrumental reasons.

In addition, pursuing higher education can sometimes be classified as a form of productive activity as defined by Bass, Caro, and Chen (1993):

> *Productive aging is any activity by an older individual that produces goods or services, or develops the capacity to produce them, whether they are to be paid or not. (p. 6).*

Individuals whose motivations are more instrumental may certainly be "developing the capacity to produce goods or services." According to Lamdin and Fugate (1997), learning needs to be seen as a key component in the life of older adults, helping them to stay healthy and lead an independent lifestyle. Some older learners may seek education to strengthen their volunteering skills. It is likely that with increases in educational attainment within the older population, higher rates of volunteering—and perhaps, more meaningful or significant volunteering, may be expected. Volunteering is seen as a form of productivity that benefits society, as well as the individual. When older people are no longer in the work force, they may look for volunteer opportunities where they can use their former job skills to remain productive and help others.

Finally, some older learners will seek education to develop or strengthen their computer skills. Limited research has been conducted on computer usage among older adults. A recent study of older adults by Angus Reid (1998) suggests that about 6% of individuals age 55+ access the Internet or use computers. Research conducted by IBM in the UK suggests that the percentage may be higher at just less than 17% for individuals age 65+ who have "ever touched a computer" (IBM, 1997). As more advanced technology becomes available, computer usage is becoming an even more prominent part of university learning. It is reasonable to assume in this present study, however, that because older students are enrolled in courses in a university, they may be more familiar with computers than the general population and likely to use computers more often. Therefore, this current study presents an opportunity to examine computer usage among older students at UMB and the extent to which they are open to high-tech methods of instruction.

RESEARCH MODEL

An action-research model was used to conduct this project. This model brings the university administration, faculty, and students together with community leaders or agency representatives to address an issue of public concern (Bass & Silverstein, 1996). The advisory group for this project included representatives from the Gerontology Institute, the administration of the University of Massachusetts Boston, faculty from the Graduate College of Education, and older learners themselves. The role of the advisory group was to provide input on the items to be included in the survey instrument and later to provide insight into the interpretation of findings. The advisory group met twice during the duration of the project.

In Spring 1999, 41 students (the majority of whom were themselves age 60+) in the Frank J. Manning Certificate in Gerontology Program adapted items from previous surveys (Caro, Stern, & Matzo, 1993; Reis Starr, 1995) and designed their own questions regarding the motivations, expectations, and experiences of older students on campus. Students were then trained in interviewing techniques for conducting a telephone survey of older learners at UMB. The research objective was to gain insights into the older learners' motivations, barriers, expectations, and their experiences and perceptions of the learning environment on the UMB campus. The questionnaire addressed various aspects of academic life of older students: reasons for enrolling; educational history; barriers to education; satisfaction with faculty, students, and curriculum; retention; and re-enrollment status. After affirmative action and human subjects review approvals were obtained, the Registrar's office supplied the researchers with a list of 1025 students age 50+ who were enrolled during Fall 1998. After the list was adjusted by

removing the names of the students in the research class, the final sample size was 984 students. Thus, gerontology certificate and undergraduate students who were members of the research class and who were enrolled during the Fall 1998 term were not surveyed.

METHODOLOGY

The Site

The University of Massachusetts Boston was established in 1964 to provide the opportunity for higher education at moderate cost to the people of greater Boston. It is located on a 175-acre campus on Columbia Point peninsula, which it shares with the John F. Kennedy Presidential Library. UMB brings the resources of a major university to people from diverse backgrounds, offering undergraduate and graduate programs in approximately 90 fields of study, as well as advanced certificate programs.

As of Fall 1998, the University of Massachusetts Boston had over 1000 students age 50+ enrolled in courses. While most were enrolled in conventional classes, some were enrolled in distance learning instructional activities. Previous research on older students at UMB had been conducted on post-educational outcomes, but it was limited to Gerontology certificate students in the College of Public and Community Service. There are four other colleges within the University: College of Arts and Sciences, College of Nursing, College of Management, and the Graduate College of Education.

Data Collection

The data were collected in two waves. All students received a letter describing the study and seeking their cooperation. The first wave consisted of telephone interviews conducted during three weekends in April 1999 by 41 students in the Frank J. Manning Certificate in Gerontology Program of the College of Public and Community Service, University of Massachusetts Boston. Each student committed a total of 16 hours of phone interviewing in a supervised phone bank setting.

A second wave of data collection was through mailed questionnaires in May 1999. Students who were unable to be reached via telephone during the April weekends were included in the second wave. These individuals received a reformatted telephone questionnaire. After

analyzing the two modes of data collection, it was determined that no significant differences existed between these two groups, and the cases were, therefore, aggregated for analysis purposes.

As noted in Table 1, data were collected from 504 students age 50+ years. Interviews ranged from 15 to 80 minutes and averaged 36 minutes. Students who refused to participate did so for a variety of reasons. Twelve percent refused to participate because of lack of interest, lack of time, or illness. Two percent refused before the survey began, and three percent were on vacation. The remaining 19% could not be contacted by telephone after multiple attempts.

Table 1. Data Collection

Sample Size	**984**
Completed surveys	504
Telephone	381
Mail	123
Response Rate	51.2%
Mean Interview Length	37 minutes
Range	15 to 80 minutes
Mean number of calls before contact	2.4 calls

Sample Description

Table 2 illustrates that the students ranged in age from 52 to 87 years with an average age of 59 years. Almost twice as many older learners were between 50-59 years (65%) as were 60+ years (35%). The majority of students were female (63%). Over half, 58%, were married, while 31% were divorced. Older learners in this sample had a median income of $45,000. Thirteen percent had an income below $19,999 and 11% had an income of over $100,000. Most of the respondents were white (81%), 8% were African-American, and 2% were Hispanic. The remaining 9% were Native American, Cape Verdean, or Asian/Pacific Islander, and other unspecified racial groups. In comparison, the Office for Institutional Research at UMB (2000) reported that in 1999, 63% of the total enrollment was white; 12% were African-American; 6% were Hispanic; and 12% were Native American, Cape Verdean, or Asian/Pacific Islander. A greater percentage of the older students who participated in the survey, therefore, were more likely to be white than in the general student body.

As found in previous studies of adult learners, this group was already highly educated (Covey, 1981; Hawkins, 1994; Graney & Hays, 1976). Eighty-six percent of the respondents had completed at least some college, while 60% had at least a four-year college degree, and 71%

were employed at least part-time (45% of students age 60+ were employed at least part-time). The vast majority, 88%, had earned their degrees from an institution of higher learning other than the University of Massachusetts Boston. Only 9% earned their previous degrees from UMB; and even fewer, 3%, earned their degree from other Massachusetts public institutions. About one-third of the older learners reported that they had been enrolled in classes within the previous five years (30%); one-third were last enrolled over 20 years ago (35%), whereas the remaining 35% had been enrolled anywhere from 6 to 20 years previously (Table 2).

Consistent with Lamdin and Fugate (1997), who observed that there was a positive correlation between health and continued learning, the respondents in this study reported that they were in good health. Two thirds of the respondents stated that their health was "excellent" or "very good," while only 7% stated that their health was either "fair" or "poor." Seventeen percent of the respondents reported that they had a disability. Of those respondents, 62% were aware that the University had an office of Disability Services available on campus. Twenty students, in fact, reported that they had utilized the disability services.

Table 2. Sample Description (N=504)

Variable		%[1]
Age	(Mean=59 years, SD=7.3 years)	
	50-59	65.2
	60+	34.8
Marital status		
	Married	57.9
	Never married	10.3
	Widowed/divorced/separated	30.8
Race		
	White	80.8
	Hispanic	1.6
	Black	8.3
	Other[2]	9.3
Income		
	< 20,000	13.4
	20-39,999	21.7
	40-59,999	27.9
	60-79,999	14.5
	80-99,999	11.6
	≥ 100,000	11.0
Education		
	High school/technical training	13.7
	Some college/Associates degree	25.4
	4-year college degree	26.4
	Graduate degree	31.9
Last enrolled		
	< 6 years ago	30.4
	6-10 years ago	13.2
	11-15 years ago	10.8
	16-20 years ago	11.0
	> 20 years ago	34.6
Health		
	Excellent	36.9
	Very good	36.9
	Good	18.6
	Fair	5.9
	Poor	1.6

[1] Percentages may not add up to 100% due to missing values or refusals.

[2] Comprised of Asian, Native American, Cape Verdean or Pacific Islander, and other unspecified racial groups.

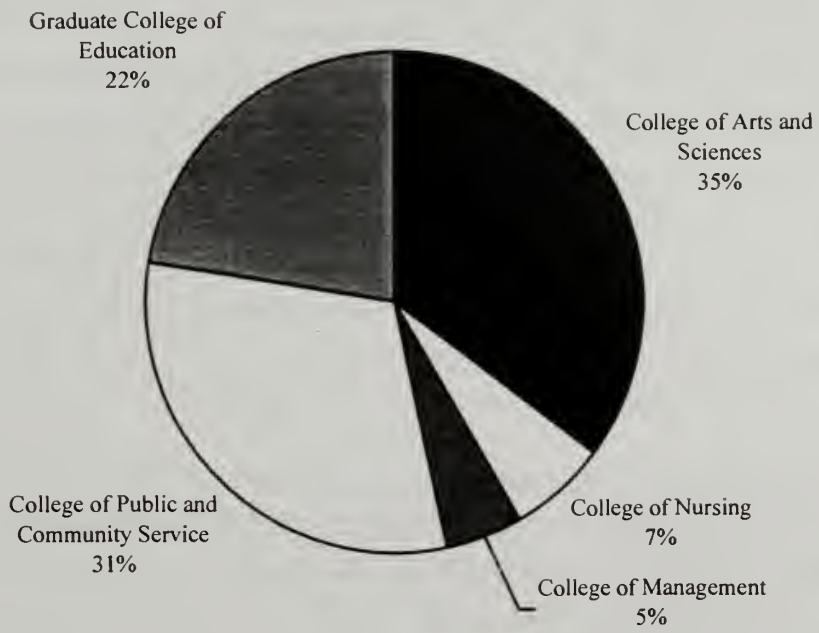
RESULTS

Enrollment Status and College

Over half (53%) of the respondents enrolled at UMB because they had heard about programs through "word of mouth" or through the newspaper (22%). Television, radio, and the Internet were noted less frequently. The respondents were enrolled in courses throughout the five colleges of the UMB campus. Figure 1. illustrates that most of the respondents were enrolled either in the College of Arts and Sciences (35%) or the College of Public and Community Service (31%). In contrast, the general enrollment across the colleges at that time was: 59% in College of Arts and Sciences, 9% in the College of Public and Community Service, 14% in the College of Management, 10% in the Graduate College of Education, and 8% in the College of Nursing. (OIRP, 2000).

Almost half of the older learners were enrolled in undergraduate programs (48%) with the largest segments enrolled in the College of Arts and Sciences (45%) and College of Public and Community Services (38%). Thirty-three percent of the older learners were enrolled in master's programs, with 48% of these in the Graduate College of Education, and 32% in the Arts and Sciences. Eight percent of the students were in doctoral programs, and the remaining 9% were enrolled in certificate programs. Fewer students were enrolled in the Colleges of Nursing or Management than in the other Colleges. (see Appendix A for a breakdown by level of matriculation). For the campus as a whole, 26% of those enrolled were graduate students. (OIRP, 2000). Respondents, therefore, were more likely to be graduate students than were students generally enrolled in the University.

Figure 1. College Enrollment



Motivations for Enrollment

Table 3 depicts the variety of factors considered by the respondents in arriving at their decisions to enroll at UMB. Reasons mentioned were career advancement, seeking new direction in life, looking for another job, gaining self-confidence, meeting new people, or the joy of learning. Reasons why older learners returned to school differed significantly between respondents age 50-59 years and those age 60+ years. Respondents who were age 50-59 years enrolled at UMB for work-related reasons and viewed classroom learning as helpful in achieving their career plans. For these learners, instrumental reasons such as "career advancement," "new directions" and "looking for another job" were significantly related to their age. For those learners age 60+ years, expressive reasons such as "becoming a more informed person," "general interest in subject matter," "keeping my mind active," "joy of learning," and "something I've always wanted to do" were significantly related to their age.

Open-ended responses to the question, "What do you expect to do with your education once you leave UMass Boston?" further illustrate instrumental motivations for pursuing higher education. The following two students had very specific plans:

"Developing a practice in conflict resolution."

"Moving [out-of-state] and looking to open a halfway house."

In addition, the researchers hypothesized that receipt of a tuition waiver might be an incentive for enrollment. In fact, 53% of the respondents reported that they received some type of tuition or fee waiver. This represented 54% of the respondents who were age 50-59 years and 51% of the respondents who were age 60+. To qualify for a waiver, a student must be an employee for the state, over age 60, a war veteran, or an employee of UMB (or a dependent of a UMB employee). Of the respondents age 50-59 who received waivers, 26% were state employee waivers, 17% were veteran waivers, and 12% were UMB employee waivers. Whether or not the receipt of a tuition and/or fee waiver was perceived as an incentive for enrollment was significantly related to the age of the respondent. For respondents age 50-59 who received a waiver, 75% reported that waivers were an incentive to their enrollment, but for respondents age 60+ who received a waiver, 87% considered the waiver an incentive.

On closer examination of financial hardship, approximately 75% of the respondents provided their own financial support for attending UMB. When asked if returning to school had been a financial hardship, 89% of the respondents who were age 60+ years said "not at all," 7% said "somewhat," and only 3% said "a great deal." However, for those learners age 50-59 years, 50% reported "no financial hardship," with 36% reporting "somewhat of a financial hardship," and 14% reporting "a great deal of financial hardship."

Beyond the additional fees and costs of books, the researchers were curious about the amount of money students spent daily on campus. Specifically, the students were asked, "including parking costs, the cafeteria, and coffee shop, how much money would you say you spend daily on campus?" The average amount spent by students age 50-59 years was $5.28, while students age 60+ years spent slightly less with an average of $4.95.

Table 3. "Very Important" Motivations for Enrollment (N=504)

Variable	50-59 years %	60+ years %	Total %
Interest in particular subject ***	76.3	64.8	73.9
Joy of learning *	70.4	85.7	73.6
More informed person	68.9	88.5	73.0
Gaining self confidence	68.9	88.5	73.0
Keeping mind active **	64.5	83.7	64.9
Something I always wanted to do	53.8	73.1	57.8

New directions in life	49.9	38.5	47.5
Career advancement ***	51.5	20.4	45.1
Meeting new people ***	25.4	49.5	30.5
Looking for another job ***	29.7	9.7	25.6
Keeping from being bored ***	21.3	36.5	24.5
More effective volunteer ***	13.1	30.1	16.6

* p<.05
** p<.01
*** p<.001

Barriers Encountered

Dispositional and Situational Barriers. Respondents were asked to identify obstacles that interfered with attending classes at UMB. Specifically, they were asked about health and situational factors as well as the physical environment on campus. Table 4 illustrates that the time of course offerings, caring for (grand)children, and other family obligations were the major obstacles mentioned. Those respondents age 50-59 were more likely to report these factors as obstacles than the respondents who were age 60+.

Table 4. Dispositional and Situational Barriers to Attending Classes (N=504)

Obstacles[1]	50-59 years %	60+ years %	Total %
Time of course offerings ***	46.9	27.8	43.0
Unspecified family obligations ***	32.4	15.6	39.1
Personal health problems	18.7	23.7	19.7
Caring for sick or disabled relative	17.4	17.5	17.5
Caring for (grand)children*	15.9	7.3	14.2
Death in the family	14.4	9.3	13.3

* p<.05
** p<.01
*** p<.001
[1]Data reflect perceived existence of an obstacle with major and minor obstacles combined.

Regarding the "time of course offerings," respondents were asked to state their preferences for weekday or weekend classes. They could check both categories if they did not have a preference. Most preferred weekday classes. They were then asked their preferences on the time of day classes should be scheduled. Those age 60+ years preferred morning (66%) classes, whereas those age 50-59 years (60%) preferred evening classes. These preferences were also related to the students' employment status. Fifty-nine percent of working students preferred evening classes. The following open-ended comments reflect the sentiment among respondents who were working. They stated that:

"courses should be offered later (i.e., 6:45 p.m.) to accommodate full-time employees."
"[need] more evening classes."
"Need more flexible class offerings."

Transportation-Related Barriers. UMB is an urban non-residential campus. Most respondents, therefore, lived nearby. Specifically, 43% of all older learners surveyed lived within ten miles of the UMB campus, while only 6% lived 31-40 miles away and 8% lived over 40 miles from campus. Fifty-one percent of the respondents commuted less than an hour to and from the UMB campus. Thirty-nine percent of the respondents' roundtrip commute was one to two hours, and 10% commuted over two hours to and from campus.

Twenty-seven percent of older learners reported having difficulties with their transportation and commute to and from campus. Further investigation of what difficulties the older learners experienced revealed that finding a parking space was "often" or "very often" difficult for about 30% of the respondents. In fact, the majority of the respondents (76%) drove themselves to the UMB campus. Those who did not drive usually took the mass transit trolley/subway (the "T"), with 24% of those age 50-59 years and 31% of respondents age 60+ riding the "T." A small percentage of both age groups used other forms of transportation such as riding with others, taking the bus, walking, riding the commuter rail, or using the MBTA RIDE (for individuals who are physically frail or handicapped). From data provided by the Institutional Research Office at UMB (2000), it appears that a greater percentage of students who drive to campus are reported in this current study than in recent studies at the university. The Institutional Research Office reported on their participation in the National Survey of Student Engagement (Spring 1999). In that survey of freshmen and senior undergraduates at UMB, 48% reported that they drove to campus; 32% took the train/"T"; 2% biked, and the remainder reported a combination of transportation modes.

Technology-Related Barriers. Some classes on campus were offered over the Internet on personal computers or in community-based classrooms away from the UMB campus. Exploring

whether or not computer usage was a barrier to older learners provided interesting results. It was hypothesized that technology might produce some barriers for the older learner. In fact, technology was not at all a barrier. In addition, it was found that older learners were very receptive to the possibility of pursuing courses offered over the Internet.

The majority of students had access to computers off campus. Specifically, 92% of the students age 50-59 years reported having off campus access to computers, compared to 72% of the respondents age 60+ years who reported having access. Also noteworthy was the extent to which older adults felt comfortable using computers, which was inversely proportional to their age. About 60% of those age 50-59 felt "very comfortable" using computers compared to 53% of those respondents age 60+ who reported that they were "very comfortable."

Use of the Internet also yielded an inverse relationship between use and age of the learner, with 86% of those respondents age 50-59 who reported that they used the Internet, compared to the 70% of those respondents age 60+ who reported Internet use. Interestingly, the majority of respondents who were age 60+ (58%) expressed greater interest in the opportunity to take classes over television cable in community centers or colleges, while 51% of those respondents age 50-59 expressed interest.

Other questions related to technology use regarded the extent that older students would be willing to take courses in alternative teaching modes. Included in the survey were questions about distance learning, internships, group projects, and independent study. There was no discernible difference between the students age 50-59 and the students age 60+ with regard to the extent to which they are open to new modes of learning. Above all, these students showed great interest in distance learning opportunities. Over 90% of students age 50-59 years and 75% of students age 60+ years reported that they were interested in taking this type of course. To get a better understanding about the type of distance learning courses they were interested in, students were asked about both Internet and classroom-based distance learning courses. Older students were more interested in Internet classrooms; specifically, respondents age 50-59 (82%) and 60+ (65%) were more interested in Internet classrooms than distance learning cable classrooms.

Barriers Experienced in the Classroom. It was also hypothesized that aspects of the classroom might produce some barriers for the older learner. In fact, the overall picture is that the respondents reported relatively few serious barriers.

Many of the educational opportunities for older adults are typically age-segregated. These data suggest that there is a preference for more age-integrated learning. In fact, the

majority (87%) of the respondents preferred classrooms that were composed of both younger and older students. Only 9% preferred classes with students older than themselves, while 3% preferred classes with students who were younger.

Difficulty finding classrooms, scheduling appointments with professors, and feeling the demands of homework were obstacles cited by the respondents overall. Those respondents age 50-59 expressed that scheduling appointments and the demands of homework were obstacles more often than the respondents that were age 60+. Several respondents illustrated this sentiment by stating,

"we need more tutors – been out of school for 30 years."

"need extra time for test taking. Seems to take more time since I'm older."

"[need] more time with instructors, more personal guidance, returning students need expert guidance."

Further supporting the needs expressed in these statements, Table 5 indicates that almost 40% of the respondents expressed difficulty "often" or "occasionally," "hearing what other classmates said." Thirty percent had difficulty "often" or "occasionally" "reading what was written on the board," and over a quarter of the respondents had difficulty "often" or "occasionally" "hearing what professors said."

Table 5. Barriers Experienced in the Classroom (N=504)

Variable	50-59 years %	60+ years %	Total %
Demands of homework ***			
Often	20.6	28.0	19.5
Occasionally	46.0	15.0	42.4
Never	33.4	57.0	38.0
Difficulty finding classrooms			
Often	13.8	10.6	13.2
Occasionally	46.8	40.4	54.5
Never	39.4	49.0	41.3
Difficulty scheduling appointments with professors **			
Often	9.5	4.3	8.5
Occasionally	26.6	17.2	24.7
Never	63.9	78.5	66.8
Difficulty hearing what other classmates say			
Often	7.3	9.5	7.8
Occasionally	30.6	30.5	30.6
Never	62.0	60.0	61.7
Difficulty reading what is written on the board			
Often	5.0	6.3	5.2
Occasionally	25.3	26.3	25.5
Never	69.7	67.4	69.3
Difficulty hearing what professors say			
Often	4.1	5.2	4.4
Occasionally	23.0	23.2	23.0
Never	72.9	71.6	72.6
Fear of competing with younger students			
Often	2.8	3.8	3.0
Occasionally	17.4	13.9	16.7
Never	79.8	82.3	80.3
Age discrimination			
Often	2.3	5.3	2.9
Occasionally	5.5	5.3	5.4
Never	92.2	89.4	91.6
Gender discrimination			
Often	1.3	1.1	1.3
Occasionally	7.3	4.3	6.7
Never	91.4	94.6	92.0
Race discrimination			
Often	1.0	2.1	1.2
Occasionally	4.1	1.1	4.0
Never	94.3	96.8	94.8

* $p<.05$
** $p<.01$
*** $p<.001$

In addition, the respondents were asked about classroom features of the learning environment (Table 6). Overall, the perception of the students across both age groups was that the ratio of students to faculty was too large. Of those respondents who were 50-59 years, only 16% rated classroom size as "very good" or "excellent," followed by 20% of those age 60+ who rated the classroom size as "very good" or "excellent." The majority of respondents in both groups found the temperature in the classroom as "fair" or "poor." Significant differences were found in the lower ratings given by the respondents age 50-59 on the lighting in the classroom. Over 50% of both age groups reported that the chairs were "fair" or "poor." One respondent reported that "they're too small."

Table 6. Rating of Classroom Physical Environment (N=504)

	Poor/Fair %		Good/Excellent %	
	50-59	60+	50-59	60+
Ratio of students to faculty	40.1	29.7	59.9	71.3
Classroom lighting*	32.6	30.1	67.4	69.9
Classroom size*	36.8	36.0	63.3	64.0
Blackboards	36.2	38.5	63.8	61.5
Desks**	60.2	41.2	39.8	58.8
Chairs	60.9	50.9	39.0	49.1
Air quality	61.7	55.7	38.3	44.3
Temperature in classroom	61.9	60.8	38.1	39.1

* $p<.05$
** $p<.01$
*** $p<.001$

Barriers Experienced on Campus. Respondents were asked to rate a number of services offered on campus. The perceptions of the two age groups varied in the same direction for each facility or service utilized. Consistently, older learners age 60+ rated the services as "excellent" more often than did the learners aged 50-59 years. One respondent, a former Vietnamese POW, stated,

"You have to understand that we are happy to be at a University to study, the condition of the building is not important."

Specifically, 18 different aspects of the physical environment on campus were assessed to determine any differences between the two age groups of respondents (Table 7). Administrative services were rated lower by the 50-59 year old students with 39% of the respondents who were age 50-59 compared to 44% of those respondents age 60+ who rated administrative services as

"very good" or "excellent." Similarly, the 50-59 year old students rated the bookstore less favorably, only 32% rating it "very good" or "excellent," versus 42% of those age 60+ who gave the bookstore a "very good" or "excellent" rating. In comparison, 35% of the respondents age 50-59 years and 62% of the respondents who were age 60+ gave health services a "very good" or "excellent" rating. Moreover, 27% of those age 50-59 years compared to 38% of the respondents age 60+ years rated food services as "very good" or "excellent." The library was rated the highest within both groups. Forty-six percent of those respondents age 50-59 rated the library "very good" or "excellent," and 56% of the respondents age 60+ rated the library "very good" or "excellent."

The majority of students noted a lack of safety with the pedestrian walkways in the garage; 67% of students age 50-59 and 56% of students age 60+ gave pedestrian walkways in the garage a rating of "fair" or "poor."

Several respondents expressed their concerns regarding the physical environment on campus:

"Physical accessibility difficult,"
" long walk across campus,"
" too much walking."

Directional signs were also found to be a significant factor between both age groups. A comment was made that *"[we] need maps and directions [for the campus]."*

Table 7. Campus-Wide Physical Environment (N=504)

	Poor/Fair %		Good/Excellent %	
	50-59	60+	50-59	60+
Width of Doorways	9.9	6.8	90.1	93.2
Distance from Class to Restrooms	8.9	13.1	91.1	87.0
Wit's End (coffee shop)	23.9	20.3	76.2	79.7
Overhead Walkway	20.5	21.9	79.5	78.1
Library	16.8	22.2	83.2	77.8
Administration	25.2	23.1	74.7	77.0
UMass Bookstore*	25.9	30.3	73.6	69.7
Food Services	26.6	30.6	73.4	69.4
Ease of Opening Doorways	29.4	32.7	70.6	67.3
Access to Public Phone	37.1	36.6	62.8	63.5
Health Services**	20.4	38.2	79.6	61.7
Computer Lab	28.8	39.6	71.1	60.3
Copy Center**	28.8	40.3	71.2	59.7
Windows**	64.7	43.8	35.3	56.1
Restrooms	49.3	45.5	50.7	54.5
Directional Signs*	48.3	36.6	51.7	54.2
Garage Pedestrian Walkway	64.5	61.5	35.4	38.6
Elevators	63.8	66.7	36.2	33.4

* $p<.05$
** $p<.01$
*** $p<.001$

Expectations

The expectations of older learners revolve around what students expect to do once they complete their coursework at UMB. The respondents offered expectations related to pursuing future employment opportunities, participating in volunteer activities, and staying connected to UMB as alumni.

As was true with their motivations, students age 50-59 years reported very instrumental expectations related to next steps in their careers, whereas the students age 60+ were likely to state that they would continue taking classes. The following open-ended comments illustrate the instrumental expectations of the students age 50-59 years:

"...go to Latin America and teach English."
"Feels [better equipped] to help those people [Women's Shelter]."
"Get institutional qualifications to continue writing and possibly teaching."

Employment and Volunteering. Many of the respondents were in the workforce or volunteering while they were pursuing higher education. Eighty-five percent of the respondents who were age 50-59 years were employed at the time of the survey, and almost half, 47%, of those age 60+ were working. Of those respondents who were employed, 82% of the 50-59 year olds were employed full time, and 50% of the 60+ students were employed full time. .One student stated that [faculty] need to "realize that many are coming from jobs, [we're] not recently retired." The respondents who were age 50-59 years were more likely to state that they would be seeking full time employment upon completion of their studies than the age 60+ respondents. Conversely, seeking part-time employment was significant for the age 60+ respondents. In addition, respondents age 60+ years tended to report greater interest in seeking volunteer positions than the respondents age 50-59 years.

Alumni Connections. Finally, the students were asked to indicate ways that they might continue to be connected with UMB upon completion of their studies (Table 8). Overall, the respondents intended to maintain their connection to the University. Almost half (46%) of each age group stated that they would join the Alumni Association. Specifically, older learners age 60+ more than those age 50-59 reported that they would continue taking courses at UMB; bring friends to visit UMB; attend lectures on campus; volunteer for UMB; and make monetary donations to UMB.

Table 8. Alumni Connections (N=504)

Type of Contact	50-59 years %	60+ years %	Total %
Recommend UMB to others	76.2	75.0	76.0
Continue taking courses***	66.5	73.9	67.9
Attend lectures***	61.2	67.7	62.5
Join Alumni Association	46.0	45.8	45.9
Utilize facilities	43.0	35.4	41.5
Bring friends to visit***	32.2	40.6	34.4
Monetary donations**	29.7	35.4	30.8
Volunteer for UMB***	28.0	40.6	30.4
Sporting events	10.2	10.4	10.2

* $p<.05$
** $p<.01$
*** $p<.001$

CONCLUSION

Overall, this sample was healthy and highly educated with two-thirds reporting "excellent" or "very good" health and 60% having a Bachelors' degrees prior to their enrollment at UMB. Already in the workforce and volunteering while pursuing higher education, 71% were employed at least part time. This finding is consistent with the theme of productive aging. In addition, this group did not perceive many barriers such as situational, environmental, or technological that interfered with their ability to pursue higher education. They were, after all, already on campus and actively involved in their learning as opposed to a sample of students who were formerly enrolled but were unable to complete their studies. This latter group might be valuable for future explorations on retention of older learners in higher education.

By defining the 50-59 year old group separately from the 60+ group of older learners, this study adds to the literature that states that motivation to pursue higher education is mainly expressive. In contrast, these data illustrate a clear separation between older learners who are less than age 60 who have more instrumental motivations and students age 60+ whose motivations tend to be more expressive in nature. This study bears out Scala's (1996) hypothesis that as "older adults remain in the workforce longer there will be an increasing number enrolling for more instrumental reasons."

Several students had stated the need for an increased system of support at UMB among older students. This was expressed by the older learners in their own words:

"[Need] liaison person for older students to help 'learn the ropes' in the University. A lounge or quiet area for meeting."
"Helpful to have a peer support group."
"There should be a club for older students - combining study and social."

Perceived barriers did not appear to be serious. Many complaints related to the physical environment and most likely, a comparison sample of students less than age 50 would yield similar findings. The major barriers noted by the respondents were limited availability of parking spaces, costs associated with tuition and fees, transportation challenges, lack of support from family members, difficulty scheduling classes, and the demands of homework (the latter two expressed more often by those respondents age 50-59 than the 60+ group).

Course time preferences indicate that the 50-59 age group are more likely to prefer evening classes, which can be attributed to their working full-time or family commitments. On the other hand, respondents age 60+, who were more likely to be working part-time, preferred morning classes. As one student observed in commenting that in order to accommodate the older

students who are working, faculty and staff should consider *"keep[ing] offices open at night"* or think about course scheduling times: *"4 p.m. is too early for full-time employees to leave early and make up time at work another day."*

Perhaps the most interesting data for administrators come from the questions regarding alumni activities and expectations for how students expect to maintain their connections to UMB. With the exception of attending sporting events, the students age 50+ intended to maintain their connection to UMB through taking courses and attending lectures to making monetary donations and volunteering. Moreover, over two-thirds indicated that they recommend UMB to others.

The findings of this study suggest that there is a difference between older learners age 50-59 and the learners age 60+ in the type of motivation that drives them to enroll in higher education and the type of expectations they have. Namely, the learners age 50-59 have more instrumental than expressive motivations. The learners age 50-59 are pursuing higher education for career advancement and skill building, while the learners age 60+ have more expressive motivations and expectations such as joy of learning and becoming a more informed person.

Learners age 50-59 had greater concerns regarding the demands of homework and finding difficulty with scheduling appointments with professors than did the respondents age 60+. The overwhelming majority of both groups reported that they "never" experienced age discrimination and both groups preferred age-integrated versus age-segregated classrooms.

It was hypothesized that the questions related to the physical environment would raise greater concerns among the respondents and provide opportunities for them to voice displeasure. In fact, the respondents' main focus was on their learning and seemed more tolerant of the physical environment than the researchers expected. A few aspects did emerge as bothersome: lack of sufficient and clear directional signage, lack of pedestrian walkways in garage, poor lighting in classrooms, classroom furniture that was awkward and uncomfortable, and lack of classroom temperature control.

The majority of respondents overall had access to and were comfortable with using computers. While the percentages were greater in both respects among the respondents age 50-59 than age 60+, these data were much higher than previously reported in the literature (Reid, 1998; IBM, 1997). It is probable that individuals on campus are more likely than the general public age 50+ to be inclined to computer use.

RECOMMENDATIONS FOR HIGHER EDUCATION

The first step for administrators and researchers interested in older learners in higher education is to find out how many older learners are already on campus. At UMB, the data on older learners were, for the most part, invisible when combined in a cluster of students age 30+. The old adage that "you don't exist unless you are counted" may have relevance here.

The next step after the awareness of presence of older learners on campus becomes established (just over 8% of all registered students in Fall 1998 at UMB) is that administrators consider creating a standing committee whose mission is to concern itself specifically with older learners on campus. This is a constituency that will grow in numbers. Yet, it has not been cultivated or nurtured as a focus of attention or as resources in higher learning. As alumni, this constituency has demonstrated through this survey that they desire to be supportive of the university both in time and dollars.

A *Standing Committee on Older Learners* might be in a position to consider the following recommendations that emerge from this study:

1. **Heighten the awareness of faculty and administrators of the needs and expectations of older learners.** Various special interest groups have their own clubs or organizations on campus through the Office of Student Life. Providing the opportunity for older students, who have similar interests or are at the same place in their lives, to meet and share their personal experiences would be a first step towards providing an avenue of support for older students. As illustrated in Figure 1, older students are enrolled in every College on the UMB campus, but rarely have the opportunity to interact with one another. Since many of the respondents are currently working, either part-time or full-time, this would be another incentive for older students to gather and discuss their work experiences, as well as their intentions toward pursuing future employment.

2. **Increase older learners' awareness of the senior tuition and fee waiver**. Over half of the respondents age 60+ (51%) did, in fact, utilize the senior waiver, and the majority of that age group who received a waiver (87%) noted that the waiver was an incentive toward their enrollment at UMB. Since the waiver is contingent upon space availability, the University is not likely to face an undo burden by more prominently noting the existence of the waiver.

3. **Develop a succinct exit questionnaire** for all older learners as they complete any certificate or degree, in order continually to identify barriers to enrollment and to identify trends in motivation, expectations, and experiences.

4. **Provide placement opportunities for older learners who are interested in career opportunities and volunteerism.** Research has shown that older adults who work part-time are more likely to be engaged in some type of volunteer activity than older adults who work full-time (Herzog & Morgan, 1993). Since respondents over age 60 are less likely to be working full-time and expressed a significantly higher interest in volunteering for UMB, the administration may want to target these individuals, encouraging them to stay connected to the University. Design a special advisory/counseling packet for the younger-older adults (aged 50- 59) focused on career changes and on new employment opportunities. For learners age 60+, make available training on volunteerism through the UMB volunteer or development offices.

5. **Inform older learners about support services available on campus.** Older learners are open to new technology, modes of learning, and computer usage. Older learners should be made aware of the computer training available to them on campus so that they can easily access it and prepare for future online learning.

6. **Consider adaptations to the physical environment that in being supportive to older learners will benefit all on campus.** An example of such an adaptation might be clearly defined pedestrian walkways in the underground garage.

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Appendix A: Enrollment Breakdown by Level of Matriculation[1]

Figure 2. Enrollment in College of Arts and Sciences (N=143)

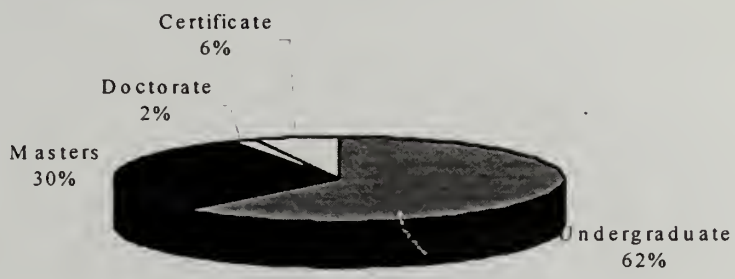


Figure 3. Enrollment in College of Nursing (N=29)

Figure 4. Enrollment in College of Management (N=21)

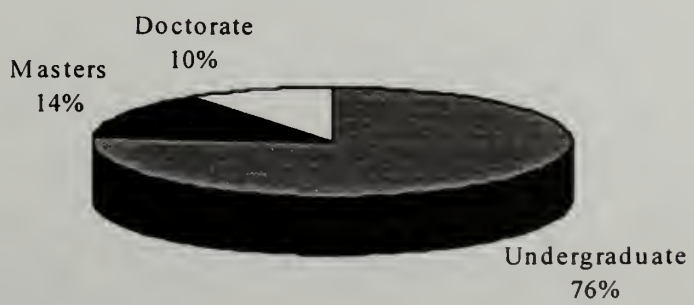


Figure 5. Enrollment in College of Public and Community Service (CPCS) (N=131)

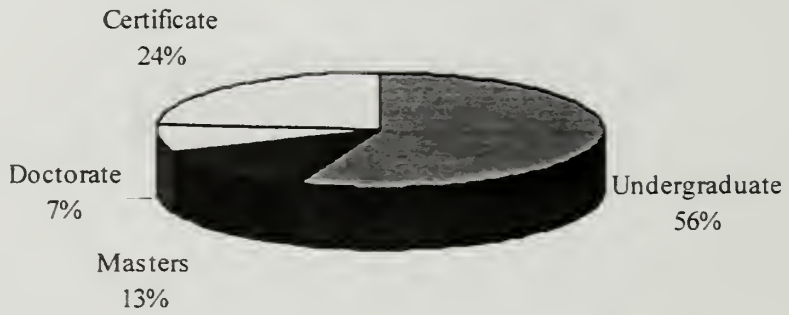
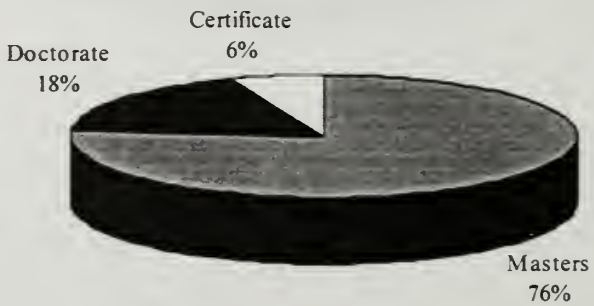


Figure 6. Enrollment in Graduate College of Education (N=85)



[1] Combined total does not equal 504 due to missing data.

THE GERONTOLOGY INSTITUTE

University of Massachusetts Boston

The Gerontology Institute at the University of Massachusetts Boston addresses social and economic issues associated with population aging. The Institute conducts applied research, analyzes policy issues, and engages in public education. It also encourages the participation of older people in aging services and policy development. In its work with local, state, national, and international organizations, the Institute has four priorities: 1) productive aging, that is, opportunities for older people to play useful social roles; 2) health care for the elderly; 3) long-term care for the elderly; and 4) economic security for older people. The Institute attempts to pay particular attention to the special needs of low-income minority elderly.

Established in 1984 by the Massachusetts Legislature, the Gerontology Institute is a part of the University of Massachusetts Boston. The Institute furthers the University's educational programs in Gerontology. One of these is a multidisciplinary Ph.D. program in Gerontology. Through the Institute, doctoral students have the opportunity to gain experience in research and policy analysis. Institute personnel also teach in the Ph.D. program.

The Institute also supports undergraduate programs in Gerontology. Foremost among these is the Frank J. Manning Certificate Program in Gerontology, which prepares students for roles in aging services. Most students are over 60 years of age. Each year the Institute assists this program in conducting an applied research project in which students administer a large telephone survey. The Institute also supports an Advanced Certificate program; its in-depth courses focus on specific policy issues.

The Institute also publishes the *Journal of Aging & Social Policy*, a scholarly, peer-reviewed quarterly journal with an international perspective.

You can obtain information about recent Institute activities by visiting the Gerontology Institute's web pages: www.geront.umb.edu or e-mail: gerontology@umb.edu.