EQUITY, ACCESS AND SUCCESS: ADULT LEARNERS IN PUBLIC HIGHER EDUCATION

Michelle Buchler, Jane Castle, Ruksana Osman,
and Shirley Walters [1]

1. INTRODUCTION

1.1. GENERAL CONTEXT AND OVERVIEW

Unlike research into access and success for school-leavers entering higher education (HE) in South Africa, very little research has been conducted into adult learners in HE. Apart from generalized, albeit extensive, socio-economic studies on poverty and inequality, including changing patterns of participation in education more generally (for example, Gelb, 2003), there is little information, at the systems level, on 'deeper' questions, such as the push/pull factors for adult learners entering higher education, the barriers they face and experience once in higher education institutions, their success and completion rates, and their reasons for entering HE institutions. These issues have taken on a much greater significance than before in post-1994 higher education policy developments that call for the widening of the social base of higher education to include, *inter alia,* adult learners.

In this context, the broad purpose of the research was to find out whether a higher education system that facilitates access, equity and success for adult learners exists or is being formulated in South Africa. One aspect of the research was to investigate the participation rates of adult learners in the higher education system, in general, and to attempt to identify variables (apart from age), such as gender, class, race, marital status and family obligations, employment status and sectors, and funding sources, which may characterize adult learners as a distinct group. The second aspect of the research was to study the ways in which three public institutions – the Vaal University of Technology (VUT), the University of the Witwatersrand (Wits) and the University of the Western Cape (UWC) – engage with adult learners as a 'special' category of student. This aspect of the study was designed to identify systemic and contextual factors that facilitate or hinder the participation of adult learners, and to provide insights into the nature and quality of adult learners' experiences of particular institutions and programmes. The questions that framed the research were:

- Who are the adult learners in public higher education? How are they defined and characterized? How are these understandings of adult learners reflected in programme design?
- Which programmes do adult learners access? What is the nature and quality of these programmes?
- Are institutions responsive to adult learners, and to policies advocating an increase in their participation? Why, or why not?

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- What systems are in place to attract adult learners to the institution (or programme), and to support them once they are there? What systems are in place to monitor the retention and success of adult learners?

1.2. ADULT EDUCATION WITHIN HIGHER EDUCATION IN SOUTH AFRICA

Although there is a history of adult learners in public higher education in South Africa, it is largely an undocumented one. Adult learners, whether part-time, full-time, occasional or continuing education students, have gone unnoticed. At several of the historically black Higher Education Institutions (HEIs), working adults attended classes after normal working hours, because civil servants, teachers, nurses, and others were to be upgraded to administer the former apartheid structures. Extensive 'evening classes' were set up in the 1970s in several of these institutions. The major distance education university, the University of South Africa (Unisa), also had many working students.

There is a history of adult and continuing education departments at many of the South African universities, for example, after World War 2, returning soldiers attended universities, like Wits.

But the brief of the universities has not been to focus on adult learners within the academy. There have been different traditions at the historically English, Afrikaans, advantaged and disadvantaged, universities and technikons. For example, at the historically advantaged English-speaking universities, there have long been the equivalent of 'extra-mural studies' departments, which conducted public education through lectures, short courses and events. At all the HEIs, there were also professional continuing education programmes, sometimes offered through a central unit, or decentralized and offered by different faculties and departments. From the early 1980s, departments of adult education concentrated on the professional development of adult educators, the study of adult education, and community service to poor communities (Gush & Walters, 1995; Aitchison, 2003). At the Afrikaans speaking universities, bureaus for teaching and learning were established.

In the last ten years, there have been various changes to those structures that support aspects of adult learning in higher education. A number of examples demonstrate these trends: at Wits, a structure like WitsPlus has been established to run classes, especially for part-time students, while the department of adult education has been incorporated into the school of education; UWC has set up a new structure distinct from its department of adult education, the Division for Lifelong Learning, to work across the campus to promote a culture and institutionalization of lifelong learning; UCT has disestablished its department of adult education, but has created the Centre for Higher Education Development (CHED) within which a range of adult learning concerns are addressed.

At several public HEIs, there seems to have been a sharp increase in the provision of continuing

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2 Courses approved by professional bodies for the purposes of registration and professional development.

3 In particular, the introduction of RPL in South Africa has its roots in the labour movement, and the struggle by the Congress of South African Trade Unions (COSATU) to introduce adult education and workforce development initiatives in the workplace (see Lugg *et al.,* 1997; Ballim *et al.,* 2000: 187).

education courses (‘short courses’ as they are sometimes called) through faculties, schools and departments. Figures on these students and programmes are, however, not readily available. These courses fall outside the mainstream degree provision, but some articulate into accredited academic and professional development[2] programmes. Another development has been the emergence of degree programmes, albeit on a limited scale, which specifically target working adults in the corporate sector. Examples are the Bachelor in Management Leadership at Free State University, and degrees offered by WitsPlus at the University of the Witwatersrand.

As the above sketch indicates, adult learning and adult education at HEIs are undergoing shifts of emphasis. There are no studies as yet which analyse and explain these. But there is substantial movement in the institutional configuration of areas, which are related, but differently named: adult education, adult learning, continuing education, academic development, staff development, and lifelong learning. These shifts are not peculiar to South Africa as Usher, Bryant and Johnston (1997) signal in their reflections on the field of adult and continuing education since the late 1980s in the UK.

1.3. POST-1994 POLICY TRANSFORMATION AND ADULT LEARNERS

One of the first acts of the new South African government was to establish the South African Qualifications Authority (SAQA Act, 1995). SAQA was established to oversee the implementation of the National Qualifications Framework (NQF), which in turn was to assist in the creation of an integrated education and training framework that would overcome the fragmentation and inequalities of the previous systems. The development of an NQF in South Africa was strongly influenced by the discourse on and practice of qualifications frameworks elsewhere, and was thus accompanied by notions of lifelong learning, the Recognition of Prior Learning (RPL),[3] flexibility and portability of learning, and qualifications that have generally come to characterize NQFs around the world.

With specific reference to policy change and transformation in the higher education sector in South Africa, references to broadening the base of higher education are explicit and frequent in the key higher education policy documents emanating from government over the last ten years. They are directly related to the inherited disparities of access, opportunity and resources for staff, students, and institutions across racial, gender, class and geographical lines. These policy documents locate key changes within the discourse of lifelong learning and the development of a ‘learning society’, and make reference to key principles located in the NQF, such as RPL.

A key feature of the projected new system is that it will reflect ‘a broadening of the social base in terms of race, class, gender and age’. In addition, ‘The system will open its doors, in the spirit of lifelong learning, to workers and professionals in pursuit of multi-skilling and re-skilling, and

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4 During the course of the research there have been formal and informal attempts to gain a better understanding of who, in the NPHE, the target group of ‘adult learners and workers’ is intended to be. In an interview with a senior Department of Education official', the view was given that officials/policy makers at the time had a tacit and shared understanding that this category of potential student was a product of the political and labour movements (hence ‘workers’), and had been active in a variety of the political, trade union and community organizations during the ‘struggle years’. To what extent this is a general understanding across different role-players within higher education in South Africa is not possible to say.

adult learners whose access to higher education had been thwarted in the past' (DoE, 1997: 17). Three additional points are worth noting from the White Paper at this stage. Firstly, there is an explicit recognition of the fact that inequalities in the sphere of higher education cannot be resolved in isolation from the broader challenges of political and economic reconstruction and development, nor from the 'distinctive pressures and demands of the late twentieth century, often typified as globalization' (DoE, 1997: 9). Secondly, there is provision for changes in the funding formula to include earmarked funds for institutional redress, student financial aid, improving completion rates, and building research capacity. These are subject to fiscal constraints and the high costs of realizing equity and growth objectives over time. Thirdly, the inclusion of private and publicly funded colleges and of distance education institutions within the new coordinated higher education system is provided for. These include the colleges of education, nursing, police, military and agriculture, through which large cohorts of the current workforce had attained their formal qualifications, many of which were recognized as discriminatory and inadequate, and in need of upgrading.

Following the *White Paper 3*, the *National Plan for Higher Education* (DoE, 2001a) advocates an increase in the general participation rate in public higher education in South Africa, with the aim of facilitating lifelong learning, developing the skills base of the country, and redressing historical inequities in the provision of education. The *National Plan for Higher Education* (NPHE) acknowledges that in the short to medium term, a shortage of qualified matriculants (school leavers) made the targeted increase (from 15% to 25% of the population, over a period of 10-15 years) unlikely. The NPHE suggests that participation rates in public higher education in South Africa could therefore be augmented by recruiting increasing numbers of 'non-traditional' learners, identified as workers, mature adults, women and disabled people. This should be 'an important policy goal in its own right', but the NPHE notes that institutions have done little to initiate RPL opportunities or 'programmes to attract workers, mature learners, in particular women, and the disabled, who were denied access to higher education in the past' (DoE, 2001a: 2.4). It also notes that there is a 'large potential pool of recruits' indicated by the 1996 census data: 1,6m adults were then in the 25-39 age group with a Matriculation (School Leaving) Certificate.

However, the NPHE was finalized during the period of a rapid increase of total student numbers, and concerns emerged in government and bodies, such as the Higher Education Quality Committee (HEQC) about the effects of this growth on quality of provision, and the impact on throughput rates. One response by government has been to review growth rates and to insist that in the short-term, at least, the system focuses on retention (including quality of provision and improvement of throughput) and not growth. At this point, the impact this may have on the increased participation of adult learners is not yet clear.

For the purposes of this research, one of the key problems of the NPHE, as it relates to adult learners, is that the terms 'adult learner' and 'workers' are not defined.[4] This lack of definition causes some difficulty for the researchers. The relevant literature was therefore used to assist in developing a more nuanced understanding of the term 'adult learner'.

2. WHO IS AN ADULT LEARNER?

There is a great deal of debate in the literature on what it means to be an 'adult learner' besides the notion of chronological age. Different terms are used to describe people. who do not come to higher education straight from school, or who may be working or who are older than the average student. Sometimes these are referred to as 'non-traditional' learners or 'part-time learners'. The most significant dimensions appear to be that adult learners carry 'adult responsibilities' through their economic, family or community commitments. They bring complex life experiences to the learning environments and their time is often very constrained precisely because of their multiple roles and responsibilities.

In addition, Bourgeois, Duke, Guyot and Merrill (1999: 3) define 'mature adults', for the purposes of higher education contexts, as having had 'a significant break, with other life-[experience] and work-experience, prior to entering higher education'. Furthermore,

> More than half of those in modern [Higher Education] systems are adults in the sense of having left full-time education for other roles before returning later to full-[time] or part-time study. Such students commonly combine study with other major life roles: work, family and community. Their dedication to the business of being a student is less exclusive. On the other hand their occupancy of the student role may be more single-minded and purposeful: getting a degree, not living the life of a student who is growing up. (Bourgeois *et al.,* 1999: 17-18)

In defining 'adult' in HE in the United Kingdom, 'young' students and 'mature' students are defined as being either under or over the age of 21, respectively, in the year of entry. For the purposes of employment benchmarks, this 'mature' cohort is further split into under or over 25 (McGivney, 2004: 35). According to McGivney, students in their early to mid-twenties are quite likely to have more in common with those in their late teens, than 'those in their late 30s, 40s and 50s whose lifestyles, learning goals and aspirations are often qualitatively different' (2004: 33).

In a context like South Africa, where there may be child-headed households through loss of parents due to AIDS, where many black school students are older at entry, or where poverty has meant "stopping out" of school for a time, the issues of what it means to be an adult learner become even more complex.

For the purposes of this study, the current legislative definition in South Africa of the 'mature age' learner, who is 23 years or older, has been adopted. Current policy regulates that from the

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[5] The literature search yielded little on adult learners and higher education in developing countries – in Africa, the focus on adult learners is generally on expanding literacy initiatives and skills development programmes, often in combination. Almost the only exception to this is the further training and 'upskilling' of in-service teachers (but even in this field it is recognized that the qualification levels of teachers are on a downward trend in developing countries, and that not all in-service teacher training is provided by universities [Bennell, 2004]). In Latin America, Adult Education and 'Permanent Education' (the equivalent of lifelong learning) are concepts and disciplines that are increasingly being incorporated into Latin American education systems. However, even if it is generally acknowledged that adult students have particular needs, the overall social context mostly determines that the education priorities for adults are literacy, the completion of primary and secondary schooling, social development and the eradication of poverty through the insertion of adults into the market place (Pieck, 1999).

[6] An exception is in the area of the Recognition of Prior Learning (see Castle & Attwood, 2001; Castle, 2002; Breier, 1998, 2003; Breier & Burness, 2003; Osman & Castle, 2002, 2004). Also see Walters (2004) for an overview of adult learning in higher education. There is also an emerging literature on lifelong learning in higher education (e.g. Volbrecht *et al.,* 2000; Walters, 2005).

[7] Lifelong learning is also associated with personal growth and change, including self-initiated learning projects, but this meaning receives scant attention in education policy documents.

age of 23, people are able to obtain ‘mature age exemption’, which means access to higher education without a Matriculation Endorsement [for University Entrance]. At 45 years of age, access is possible without a school-leaving qualification. This includes ‘workers’, ‘professionals’ and ‘adult learners’, as mentioned in the NPHE, under the term ‘adult learner’. The use of this definition raises a number of issues, not least of which is the question about the history of the definition of ‘mature age exemption’ in South Africa. It is beyond the scope of this study to explore this, but this study certainly raises questions about the appropriateness of the current definitions. While 23 years and older has been taken as a marker for ‘adult learners’, the limitations of the data available have not allowed the distinction as to whether students have been working or holding other family responsibilities. The age of the students has therefore become the primary distinguishing feature, which is not ideal and which will need much more refinement in later research.

3. KEY THEMES ON ADULT LEARNERS WITHIN HIGHER EDUCATION: AN OVERVIEW OF THE LITERATURE

This review is limited to a number of key themes primarily found in the Anglophone literature.[5] Little has been published in the area of adult learning in higher education in South Africa,[6] especially from the perspective of students and their experiences of access and exclusion.

3.1. Lifelong learning

Throughout the 1990s, internationally and in South Africa, increasing the participation of adults in higher education has been seen as a way to develop a culture of ‘lifelong learning’ – a key objective of governments attuned to economic development and competitiveness in global markets, and concerned to enhance social inclusion, active citizenship, redress and cultural enrichment. Lifelong learning is a notoriously slippery term, which is used in at least two ways in educational debates (Aspin & Chapman, 2000; Pendlebury & Enslin, 2000; Walters, 1999, 2004 & 2005).[7]

In one version, lifelong learning emphasizes the economic relevance of education and its relationship to global markets. In the second version, greater emphasis is placed on social justice, democracy and responsiveness to the community. Those concerned with preserving traditional values and academic standards in higher education view both versions of lifelong learning with some scepticism (McGivney, 2001: 6-7). The ways lifelong learning is understood relate also to the ways in which the purposes and functions of higher education are interpreted.

Both the above versions are embedded in the NPHE, with greater emphasis placed on higher education as an instrument to advance the national human resources development strategy. The major structural shifts in the economy over the last twenty-five years, the endemic shortage of high-level professional and managerial skills, and the impact of HIV/AIDS on the labour force, have ensured that there is recognition of the significant need for the continuing education of

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[8] An influential international conference was held in 2000 by UWC, Unesco Institute for Education and the Danish Pedagogical University, which produced a guide, ‘Characteristic elements of a lifelong learning university’ (UWC and UNESCO Institute for Education, 2001). This has since been translated into Spanish, Arabic, Hungarian and Chinese.

workers. In addition, the inadequate numbers of school-leavers with the necessary entry requirements for tertiary education mean that the demands for higher education graduates in the economy have to be met by ensuring that adult learners gain access to further education and training. But the debate about the meaning of lifelong learning within HEIs in South Africa has been confined to a small core of academics and activists.[8]

McGivney (2001) points out that 'increasing participation', like 'lifelong learning', is an elastic term understood in different ways. It may mean that those who have been excluded from formal education and skills development should be given such opportunities in the interests of enhancing their employment and promotion prospects in a shifting labour market. This would help to reduce poverty and make a contribution to the national economy. 'Broadening' (rather than increasing) participation may mean redressing imbalances in the kinds of people that educational institutions attract. This could imply a very wide, inclusive process, which puts the onus on institutions to adapt their practices to a student body, which is changing in terms of race, class, gender or age. Or it could mean a much narrower process, which simply means recruiting learners from different communities from those traditionally served. In the latter case, learners are expected to adjust to the institution, which remains essentially unchanged.

Internationally, there has been a growing debate on issues of access to HE, particularly for disadvantaged groups. In the UK, broadening or widening access policy developments and systemic change have been driving change in both HE and Further Education (FE). In Scotland, funding has been provided to promote widening access initiatives, including part-time study (Murphy *et al.,* 2002). The strategy of expanding part-time study, as well as increasing flexibility in pace of learning has emerged as one part of a more coherent strategy by HEIs to attract students who might access HE if is was delivered differently (Higher Education Funding Council for England, 2006). Funding has also been allocated to support adult students and for childcare support.

However, despite these changes, 'the increase in the participation in the 1990s has in fact done little to *widen* access, giving rise to what has been called a "crowded traditional system"' (Murphy *et al.,* 2002: 15). Similarly, European comparative research into access in HE shows that under-represented and disadvantaged groups' access to HE has not significantly improved in the last decade or two (Murphy *et al.,* 2002: 17). Furthermore, in the UK, where access has increased, this reflects the sectoral differentiation of the HE system. Post-1992 institutions are more likely to widen access than pre-1992 institutions (generally seen as the more elite, research-focused institutions), and access is thus stratified within a differentiated system.

Among policymakers and academics, then, there are at least two quite different perspectives on what 'lifelong learning' and 'widening participation' mean. One perspective is about designing education to meet the needs, interests and priorities of previously excluded groups. The other is about enabling greater access to unchanging patterns of provision (McGivney, 2001: 10-11). Given these two understandings, it is possible to find the terms used in a variety of ways. In South Africa, for example, 'widening participation' is increasingly used to mean the provision of education for 'previously disadvantaged' groups – those with poor educational qualifications and low levels of academic literacy, as well as those who were unable to enter higher education as school leavers at the age of eighteen.

Lifelong learning in higher education, therefore, is contested. It is contested in terms of the social purposes of higher education and in terms of how it translates into institutional practices. The economic and political environments in which lifelong learning takes place largely determine the terms of those contestations. Those who understand lifelong learning to be about 'designing education to meet the needs, interests and priorities of previously excluded groups', identify the need to adapt teaching and learning practices, as well as administrative and support systems in order to be responsive to the contexts in which students operate.

3.2. ADULT LEARNERS IN HIGHER EDUCATION

Historically, adult learners in higher education attracted no special attention and were rarely studied. The picture that holds most higher education administrators and policy makers captive is of young full-time learners. One of the first educationists to draw attention to the particular characteristics and needs of adult learners was Malcolm Knowles (1970; 1978), who drew on his experience of postgraduate students at Harvard University to develop a theory of 'andragogy'. Andragogy has been eclipsed by critical, feminist and post-modern theories of adult education, which place greater emphasis on the socially constructed nature of learning and the way the context shapes the individual and the learning (Hayes & Flannery, 2000; Kilgore, 2001; Merriam, 2001). These theories highlight the omissions and deficiencies in the present education system (including efforts to broaden access to higher education), the need to guard against an uncritical acceptance of existing structures, philosophies and practices, and the importance of working towards alternatives. This is the stance adopted in this paper.

Part-time undergraduate degree seekers, graduate students, occasional students and adults who participate in non-accredited, short courses and extension work are frequently blurred in the discussion of adults in higher education. Because of the links between student numbers (typically full-time equivalent students, or FTEs, in credit-bearing courses) and funding formulae, the question of who counts as a student becomes a key issue. Kasworm, Sandmann and Sissel (2000) note that funding formulae do not take account of the increasing number of part-time adult learners, the intermittent nature of their participation, and their increasing demands for flexible access to cutting edge knowledge and skills development. Present formulae 'suppress the fact that what may be reported and counted as only one full-time student may in actuality be three part-time adult students each of whom has diverse interests and unique needs in relation to institutional support' (Kasworm *et al.,* 2000: 454). In addition, the way in which completion rates are calculated often fails to take part-time students into account. In these ways, the policy frameworks and the funding formulae can work as disincentives to institutions taking adult learners seriously as an important constituency.

The growth in numbers of adult students in higher education in North America and the UK has been both applauded and ignored, because adult students challenge historic conventions of higher education structures, purposes and processes. On the one hand, adult students bring the world of adult aspirations and life engagements into the lecture hall, and may be viewed as valuable learners and alumnae (Kasworm *et al.,* 2000). On the other hand, many in higher education categorize these adults as 'second class' learners, because the nature of their knowledge may be informal and experiential rather than academic. They are marginalized because of their part-time participation. Their lives are filled with significant transitions and commitments. They both engage and at times withdraw from participation in education, owing to life priorities of work, family, community and personal commitments.

3.2.1. ACCESS, RETENTION AND SUCCESS OF ADULT LEARNERS IN HIGHER EDUCATION

One area of adult learning in higher education that has received attention in both international and South African studies is the reform of admissions policies and the Recognition of Prior Learning (RPL). In North America, Australia and New Zealand, RPL usually refers to the processes of reflection and assessment of experiential learning – a process that attempts to establish the value and equivalence of prior learning in relation to formal qualifications. These reflective processes are often documented in a portfolio of evidence that may be supported by interviews, observations and challenge examinations for the purpose of assessment (Buchler, 2002). Research by Breier and Burness (2003) into RPL practices in public higher education institutions in South Africa indicates that RPL is practised more widely than in 2000 (see Breier & Osman 2000) with at least 20 institutions practising some form of RPL. However, this research has also raised questions about the scope and limitations of RPL as a basis for credit exchange in higher education and points to the need for more qualitative research into its potential as a mediator of knowledge and learning transactions when adult learners move between different communities of practice at work and in the academy.

Cross (1981: 97-108), working in the USA, classified obstacles to participation in adult learning in three broad categories. 'Situational barriers' arise because of the individual's life situation, and include issues such as learners' work commitments, domestic responsibilities, as well as problems of childcare, finance and transport. 'Institutional barriers' include physical location, entry requirements, timetabling problems, as well as practices and procedures that hinder participation. 'Dispositional barriers' are attributed to factors, such as self-esteem, the opinions of others, past experiences, values, attitudes and beliefs about learning. In South Africa, Morrow (1993/4) has distinguished two types of barriers which affect students from disadvantaged educational backgrounds: 'physical access', which he sees as being similar to the institutional and situational barriers described by Cross; and 'epistemological access', or the knowledge learners have acquired in schooling, their previous experience of education, and the extent to which these relate to academic standards and practices.

In the UK, several studies (Blaxter & Tight, 1993; Merrifield, Macyntyre & Osaigbovo, 2000; Schuetze & Slowey, 2000) have confirmed that situational and institutional barriers form a major constraint to participation in higher education. The cost of tuition and learning materials, often self-financed, is a major factor. Another significant factor is lack of information, written in a clear, accessible way for its target audience, about available study paths, RPL and admissions procedures. Wright (1989) believes that these factors are not only implicated in the access and retention of students from 'non-traditional' backgrounds, but they point to the extreme inaccessibility and exclusiveness of higher education.

As Usher (1989) has pointed out, success in university studies requires mature adult learners to demonstrate competencies for progression in higher education when much of higher education itself does not know what skills or abilities are needed for particular courses and qualifications. At most institutions, criteria for progression are implicit rather than explicit, and are expressed in terms of prior qualifications which act as proxies for criteria. Yet for adult learners entering higher education, it is important for admission and progression criteria to be explicit and transparent, and for the links between diplomas and degrees to be coordinated. Usher's observation draws attention to institutional and departmental complicity in the success and failure of students, and warns against simplistic (and deficient) explanations for poor retention and pass rates.

Studies in the UK (Murphy, 2003) and in the USA (Belenky *et al.,* 1986; 1989) have drawn attention to the 'affiliation needs' of learners as a vital component of the learning process, particularly for women. Affiliation needs include the desire for learners to be connected and supportive of one another's learning, and the importance of forming relationships that encourage learning. Betts (1999) and McGivney (1999), cited in Murphy (2003), suggest that gender differences exist in the "triggers" which affect mature adult learners' involvement and retention in higher education. Male students are generally more motivated by employment prospects than women, and men find the support of tutors and peers less significant than women.

A study conducted from a black feminist perspective into the factors that motivate and hinder the participation of black women in nursing education in the USA (Aiken *et al.,* 2001) found that gender and race were significant factors. Black women were aware of themselves as being 'the other' in the classroom. Their experience of a culture of racism at individual and institutional level discourages participation. They believe their position in society is replicated in the educational environment.

Questions of participation and exclusion in learning are inextricably linked to the values of the social system in which learning takes place, as Merriam and Caffarella (1991) point out. In response to questions about who decides about participation, for what purpose, and who benefits from participation in higher education in North America, they conclude that the answers lie in the hands of the white middle class elite 'whose interest in self-preservation and self-perpetuation determines the answers' (1991: 280). Adult and higher education is thus a vehicle for entrenching existing socio-economic structures, contrary to stated goals of access and equality.

3.2.2. INSTITUTIONAL CULTURE AND POLICY CONTEXTS

There is a growing literature which emphasizes the institutional culture of higher education and what it will take to change the cultures of HEIs to be supportive, lifelong learning institutions, which enable successful participation by adult learners. Volbrecht and Walters (2000) argue that an understanding of lifelong learning, which is concerned with access, equity and success, demonstrates a systemic awareness of the interconnections between the macro-environment, the meso-organizational contexts and the micro cognitive and affective learning interactions. A lifelong learning framework, they argue, forces gazes both inwards towards individual and organizational learning, and outwards towards relationships in the broader society.

Changing the culture and the practices within higher education institutions is a daunting task. The literature that refers to the struggle to create adult-focused universities is illustrative of this. Bourgeois *et al.,* (1999) argue that the 'struggle for adultification' requires a combination of 'successful actor strategies in decision-[making] and policy-making', and 'conducive conditions related to organisational structure and context'. They too emphasize the interconnectedness of the macro, meso-levels and micro-levels both within the institution itself and reflecting the institution's place in the broader society.

4. RESEARCH METHODOLOGY AND DESIGN

The overarching frame of this research has been qualitative, by focusing on three institutional case studies. In addition, the national Department of Education's Higher Education Management Information System (HEMIS) was accessed in order to develop a systemic picture of the numbers and characteristics of adult learners present in all public higher education institutions between 1999 and 2002.[9]

Case studies were undertaken at the Vaal University of Technology (VUT), the University of the Western Cape (UWC) and the University of the Witwatersrand (Wits).[10] These institutions were chosen for their diversity and perceived uniqueness in a number of areas:

- institutional type: being a university or university of technology may highlight different responses to, and/or access and participation rates for, adult learners;
- status as former historically advantaged or disadvantaged institutions; and
- focus on adult learners; for example, decentralized versus more centralized and coordinated responses to adult learners.

Within each institutional case study, two or three programmes were chosen to highlight the ways in which responses to, and practices around, adult learners take place at the micro-level, perhaps because of or despite institutional policies and practices. These programmes were specifically chosen for the presence of adult learners, and included both undergraduate and postgraduate programmes.[11] In all three cases, interviews were conducted with students and key staff members (in the latter case, both at programmatic and institutionally strategic levels); documentary analyses of institutional and national policies were undertaken; institutional Management Information Systems (MIS) data was accessed;[12] and questionnaires were administered to some of the students in the programmes selected for study at all three institutions.

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9 1999 was the first operational year of HEMIS, while the last year for which systemic data was publicly available (at the time of data collection) for all HEIs was 2002.

10 The description of the case studies and findings can be found in fuller detail in the research report from which this chapter is derived. The research report is available from the Council on Higher Education.

11 The choice of programmes was delimited to exclude in-service teacher education, MBAs and related programmes, and short/occasional course participation. There were a number of reasons for these exclusions: Firstly, while programmes such as the National Professional Diploma in Education (NPDE) have attracted large numbers of under-qualified teachers, it is seen as a temporary and 'non-mainstream' qualification. Secondly, and with regard to MBA and related programmes, the researchers made the assumption that these programmes will, in the main, attract people from the corporate and public sectors, i.e. those already advantaged economically, educationally and socially, albeit in different ways. Thirdly, short courses and participation in occasional studies also fall outside of the mainstream of degree programmes (although occasional students may do existing modules of degree programmes, they are not always allowed access into the programmes).

12 However, in at least one case, the institution's MIS data was of limited value in that the extraction of certain variables created duplications across the datasets.

13 The only information available is the distinction between unemployed/employed. No further information, beyond this very broad distinction of employment status – such as part-time or full-time employment, sector of employment, or occupational category – is therefore available through HEMIS. Attempts to link employment status of particular individuals might be possible by using date of birth and searching the South African Revenue Services (SARS) datasets, for example, but this would be a cumbersome and costly research exercise.

14 The only funding of fees information that is captured is for NSFAS funding.

15 However, this first cohort analysis was not publicly available at the time of writing this chapter.

5. ACCESS AND PARTICIPATION OF ADULT LEARNERS ACROSS THE PUBLIC HIGHER EDUCATION SYSTEM

Whether at national or institutional level, there is no specific data on adult learners, and age cohorts must be filtered in order to isolate adults. Datasets at institutions mainly capture data from registration forms, but these are usually tailor-made to conform to the Department of Education's requirements for its HEMIS submissions, used for policy-making decisions and subsidy allocations. The HEMIS data comprises a number of datasets that are submitted by all HEIs, relating to student information (mostly biographical and Classification of Educational Study Material [CESM] categories), course registrations, credit values, qualification/CESM/course files and staff files.

Table 1: Total adult students and year-on-year increases/decreases

Year	Adult student numbers	Percentage as proportion of total student numbers	
1999	328 375	59.1%	
2000	341 097 (+12 722)	58%	(-1.1%)
2001	354 611 (+13 514)	55.6%	(-2.4%)
2002	381 581 (+ 26 970)[17]	54.4%	(-1.2%)

Source: HEMIS

The research team encountered a number of difficulties in accessing certain types of information, more specifically indicators that relate to adult learners and participation patterns. For example, the HEMIS data cannot provide detailed information on previous employment in the year prior to registration;[13] nor can it provide information on part-time versus full-time registration numbers (as the DoE is primarily concerned with FTEs for subsidy purposes), or information on who is currently funding students' fees,[14] "stop-out" trends, and so on. The issue of tracking time-to-degree is still limited in the case of adult learners as the first cohort analyses from 2000 are now possible[15] in the case of students who complete their degrees in the requisite time, but not yet for part-time students who may take five to six years (or even longer). In addition, because of the way the datasets are constructed, it is not possible to obtain certain types of information from HEMIS, as some queries would require a 'cobbling' together of fields from across the different datasets, introducing a high level of complexity and a potential for error, according to a DoE official. One such query related to FTE count by age cohorts.[16]

Given these limitations, what has HEMIS been able to reveal about the participation of adult learners in public higher education institutions? While there was a general increase of nearly 22% in the number of students in public higher education between 1999 and 2002, in contrast, the number of adult learners as a proportion of total student numbers has been decreasing slowly

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[16] The interest was in comparing headcounts versus FTEs by age cohorts in order to isolate adult FTEs and to relate these to adult headcounts. Such information/trends may point to altered institutional arrangements, requirements and resourcing to accommodate adult learners. This may, in fact, be a better indicator of participation patterns of adults than full-time/part-time registration figures.

[17] This jump in adult student numbers may be partially explained by the fact that 2002 saw the first mass intake of upgrading teachers into the NPDE. In this year, the DoE and ELRC paid bursaries for approximately 11,500 NPDE teachers. In 2003, according to HEMIS, there were a total of 21,866 NPDE and Advanced Certificate in Education (ACE) students over the age of 31.

Table 2: Students in public HEIs in 2002

Age cohort	Total students[18]	Number of students at distance education institutions	Number of students at contact institutions
Younger than 23	293 579 (43.5%)	40 742 (6%)	252 837 (37.4%)
23-25	102 955 (15.25%)	28 915 (4.3%)	74 080 (11%)
26-29	56 286 (8.3%)	36 594 (5.4%)	19 690 (2.9%)
30-34	79 718 (11.8%)	36 900 (5.5%)	42 818 (6.3%)
35-39	60 792 (9%)	25 187 (3.7%)	35 605 (5.3%)
40-44	42 445 (6.3%)	14 946 (2.2%)	27 499 (4.1%)
45-49	25 076 (3.7%)	7 457 (1.1%)	17 619 (2.6%)

Source: HEMIS

Table 3: Total undergraduate/postgraduate students per year

Year	Undergraduate students	% of UG[19]	Postgraduate students	% of PG	Total	Occasional students[20]	Total[21]
1999	472 623	86.6	74 573	13.4	547 196	6 643	553 839
2000	488 560	85.0	88 712	15.0	577 272	10 233	587 505
2001	519 456	85.0	95 308	15.0	614 764	22 897	637 661
2002	534 918	83.3	112 868	16.7	647 786	27 374	675 160

Source: HEMIS

over the same period. However, in terms of headcounts, the number of adult learners has risen steadily over this period.

While at first glance the participation rates of +23 year olds in public HEIs are certainly not that of a marginalized minority, at over 50%, accepting these figures at face value, without further disaggregation, should be done with due caution. An attempt was made to further disaggregate this broad category (+23) into more refined cohorts of adult learners in order to better understand why the numbers might be so high. As Table 2 shows, most of these adult students are in the age category 23-29, with numbers tending to drop after age 30. However, the number of 30-49 year olds in HE in 2002 is not insignificant at 208,031 or 31% of the total student body of 675,160.

In terms of the breakdown between undergraduate and postgraduate adult student numbers, over 80% of the +23 year olds are in undergraduate programmes. There has been a gradual increase in the postgraduate proportion in the years under study. The number of occasional students increased by 412% over the period 1999-2002.

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[18] The percentages in this table reflect age cohorts as a percentage of the total student body of 675,160.
[19] The percentages of undergraduate and postgraduate students are based on total number of students per annum.
[20] Occasional students are students who are registered for usually one course/module, but not for degree purposes.
[21] This number includes occasional students.

With regard to an analysis of adult participation at the level of qualification in the three case study institutions using HEMIS data, the trend seems to be that, at UWC and VUT, the 23-29 age cohort is most likely to be engaged in undergraduate/Honours level programmes, whereas at Wits there is an almost even split across undergraduate and postgraduate participation for this group (see Table 4 below).

Table 4: Over 23 years of age by qualification in three institutions 2002

Institution	Undergraduate	Postgraduate students	% of PG students	Total 23+ students	Total number of students
UWC[23]	3 856	2 443	38.7	6 299	12 729
Wits[24]	3 181	6 078	60.2	10 097	22 181
VUT	4 587	79	1.7	4 666	15 340

Source: HEMIS

Table 5: 2002 adult learners refined by age cohort in three institutions and reflected as percentages of total adult student population

Age cohort	UWC		Wits			VUT	
	UG	PG	UG	PG	Occasional	UG	PG
23-29	32.4	13.7	21.4	25.4	2.5	81.6	0.6
30+	28.9	25.1	10.1	34.8	5.6	16.7	1.1

Source: HEMIS

However, the picture changes significantly when the +30 cohort is examined: while at UWC +30 students are almost equally spread between undergraduate and postgraduate courses, at Wits only 10% of this cohort are to be found at the undergraduate level. Generally, participation rates at VUT for higher degrees are much lower than at either of the universities.[22] It is interesting to note that at Wits and UWC the proportion of postgraduates in the 23+age category is much higher than the composite national average. Given VUT's low postgraduate rate, it is likely that there are substantial differences between the former technikons and universities when it comes to this split. This highlights the need for more detailed mining of the data to understand the trends within and between institutions.

The macro-data have been useful in providing an overview of adult participation rates across the system. The numbers of higher education students, particularly at undergraduate level, who are over

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[22] It should be noted that technikons were only allowed to offer degrees from the mid-1990s.

[23] The HEMIS data for UWC in 2002 does not show occasional adult students.

[24] These figures for Wits exclude occasional +23 students, who number 838 in total.

23 years, is significant. The differences between the three case study institutions, by age cohort (23-29 versus +30), are particularly interesting. However, as is pointed out in the literature, it is unwise to assume that the 23+ groups are homogeneous. It is known that their learning experiences within higher education are shaped by a host of biographical factors. The phenomenon of such a large percentage of older learners in higher education in South Africa is difficult to explain. It is possible that the school-leaving age of many learners has risen, and with the (arguably) increasing under-preparedness of school-leavers for HE, there is a trend whereby the traditional school-leaving cohorts start later at tertiary education, and take longer to complete their qualifications. The VUT case study figures support this conclusion: in 2002, 23-25 year olds studying at National Certificate or Diploma and four year BTech. levels represent 58% of the total adult student body; the corresponding figure for 26-29 year olds is 23.3%, while 30-34 year olds comprise just 9.1%.

6. ADULT LEARNERS IN THREE INSTITUTIONS

The HEMIS data presented above provide a systems-level overview of adult learner participation in public higher education. In contrast, the student vignette that follows provides a window that looks in on the life of a real adult student and highlights many of the issues discussed in the rest of this chapter. It is based on an interview which was conducted with a part-time student in his first year of a Law degree.

Joe (not his real name) was admitted under 'age exemption' regulations (at the age of 28). He had good results in his matriculation or school-leaving examinations, but no matriculation exemption [giving him University Entrance]. He took a six-month certificate course at the University of Stellenbosch three years after leaving school. He was asked to submit a salary slip as evidence of his ability to pay his fees.

Joe described a nexus of material problems around finance, transportation and security. He had expected to be able to use taxis to and from UWC, allowing his wife to use the family car. However, he found that he needed to stay late after classes finished in order to use the library and computers and his wife felt it was unsafe to fetch him so late. As a result, he felt compelled to buy a second car. This has prejudiced his financial situation, resulting in him currently being behind with his fees. He doesn't qualify for bursaries as he did not get the required 65% average. He was unaware that NSFSAS had extended its scheme to part-time students.

Joe's employer (a large company in the wine industry with 7,000 employees) offers loans at 2% below bank rates for employees studying in areas related to their work, with 50% of the sum advanced being written off when the student successfully completes. As a production scheduler, Joe's study of law was not considered to be relevant to his job, although he expressed aspirations to working in the company's small legal department.

Joe has unreliable access to computers. He has a computer in his office at work but does not get much undisturbed time to use it for his studies. He described a complex juggling act required to ensure sufficient access to a computer. His employer has now announced the intention to remove all 'A' drives from the computers, as they are not required for work. This will make his computer access significantly more difficult as it will affect the portability of his work.

Joe experienced himself as having "wrong study methods" and it took him time to find his feet. He took a month of leave that he had accrued at the beginning of the programme. In retrospect, he feels he should have kept a lot of that leave to use around examination time and at other pressure points. He could have done with guidance and counselling from the beginning. His lecturer had informed the class about the Writing Centre and, although he had little time, he tried to use it. However, he had been told that it would only be possible after hours if a number of students wanted to use the service. His lecturer had no consultation times after hours. "For me there is no support for part-timers; there's plenty if you are full-time."

Joe's experience was that the lecturers understood his problems as a part-time student; in fact, his experience was that the majority of them were, themselves, part-time students. He found the practice of advance e-mailing of notes by one lecturer helpful, because he arrived in the lecture having studied the notes, able to listen and engage, because he didn't have to copy or note.

Joe would have benefited from having key course information ahead of time so that he could plan his study life in relation to other pressures he faces at work and at home. The student attributed "50%" of his lack of success in the first semester to this lack of administrative and academic support. He failed one of his four courses.

6.1. VAAL UNIVERSITY OF TECHNOLOGY

At its inception, and also because of its location in one of South Africa's industrial heartlands, Vaal University of Technology (VUT) has traditionally enjoyed strong industry partnerships with parastatals like Sasol, Telkom, Eskom and Iscor. At least until the late 1980s/early 1990s, VUT served a predominantly white, Afrikaans artisan/technical student body. The mid-1990 to late 1990s at VUT were characterized not only by transformation, but also by the upheaval that so often accompanies change. Since the late 1990s, VUT management has been hard at work to turn the institution into a more representative centre of excellence.

VUT opened its doors in 1966, operating as the Vaal Triangle College for Advanced Technical Education. In 1979, in line with national policy, Colleges for Advanced Technical Education were renamed 'Technikons', and VUT was then known as Vaal Triangle Technikon (VTT). Senior management lobbied for many years to change VTT's status to that of a University of Technology, and this was granted in 2004.

VUT has experienced massive growth in undergraduate numbers since the early 1980s, with accelerated growth in the 1990s. Student numbers grew from around 3 000 in 1978 to 7 800 in 1993 and 16 500 in 2001. In 2002, black Africans constituted 88% of the student body, in contrast to VUT's origins as a "white" institution. While there has been an increase in numbers across all HEIs, the Human Sciences Research Council survey of student choice (Grade 12s) in selecting HEIs shows that VUT was overall the fourth most popular choice across all students, and the third most popular institution for African students (Cosser & du Toit, 2002: 80 & 89).

The institution's vertical growth, since being conferred with degree-awarding powers in 1994, is less significant numerically but of strategic importance in positioning the institution and building its research profile.
The programmes focused on at VUT for the purpose of this research were the National Diploma and BTech in Electrical Engineering, and the Higher Diploma in Community Nursing (HDCN).

A number of issues emerge from the VUT case study:

6.1.1. SUPPORT SERVICES

Adult student responses at VUT show that few of them made use of student support services in areas such as academic support, financial advice and personal counselling (it appears that time constraints and the availability of support services outside the institution play a role in the low take-up of student support services). Adult learners were satisfied with their access to and use of the library and computer laboratories. It appears that adult students have made their lecturers their first port of call in seeking support and mentoring. What this means, though, is that lecturing staff have an added responsibility in terms of the support they provide to adult learners, and which is unlikely to be recognized as part of their formal workloads.

6.1.2. INSTITUTIONAL RESPONSIVENESS

Faculty and departmental responsiveness to adult learners has in some cases preceded institutional initiatives. This is probably a result of the decentralized way in which departments and faculties are responsible for decisions relating to teaching and learning, and provisioning. On the issue of adult learners, Engineering Faculty staff indicated that they were encouraged by industry to target young female students. In contrast, they said, there had been no demand from industry to target adult learners. However, in trying to deal with declining student numbers in BTech. Engineering programmes, adult learners were specifically targeted, and the delivery of the BTech. Engineering programmes was altered to accommodate their working lives. This meant that full-time, younger and unemployed/not yet employed students have had to adapt to a schedule that favours flexible learning and after-hours attendance.

6.1.3. QUALITY OF PROGRAMMES, AND TEACHING AND LEARNING

As many of the staff at VUT are also postgraduate students themselves, their understanding of their adult learners has been enhanced. This is reflected in the support they provide, and in their incorporation of their students' prior knowledge into the curriculum and pedagogical processes. On the whole, adult students at VUT seem satisfied with the programmes they are undertaking.

6.1.4. POLICY AND IMPLEMENTATION WITHIN A TRANSFORMATIVE CONTEXT

Until the late 1980s, VUT was an institution with a history of attracting adult learners (albeit white Afrikaner males). Despite changing its age profile considerably during the 1990s, as it became more representative of all racial groups, it has retained high numbers of +23 learners, even though it does not have explicit policies and practices to attract them. Therefore, in cases where adults have been targeted (for example, in Engineering), it has been in an uncoordinated and seemingly 'unconscious' or unreflective way. For example, in the context of VUT's Transformation Agenda and an RPL policy with an equity and redress focus, the beneficiaries of RPL in Engineering are white males with artisan/technical qualifications, a group who enjoyed educational privileged in the past.

6.1.5. FUNDING AND EMPLOYER SUPPORT

Although there is some evidence of employer support (financial and otherwise) to VUT adult students, it appears to be limited. How employers conceptualize their support is critical: For example, in the nursing programme a learner asserted that her employer focuses on funding basic training, and registered nurses struggle to get both financial support and time off for post-basic degrees. Even in the engineering sector, it appears that there is far more employer support for undergraduate programmes, if the investment that companies make in cooperative education and workplace integrated learning is considered. This raises questions about how industry sees the role and value of higher degrees; the role of skills development funding for financing study at postgraduate levels, and how employers distinguish between education and training.

6.2. UNIVERSITY OF THE WESTERN CAPE

The University of the Western Cape (UWC), like several other higher education institutions, aspires in its mission to 'encourage and provide opportunities of lifelong learning'. Unlike several other HEIs, though, it has tried to systematically implement the mission since 1996.

UWC is an urban university based in Cape Town. It is an historically black university, established in 1960 to serve people then classified as "coloured". It moved from an identity as a "bush college" in the 1970s to one that prided itself on its identification with the mass democratic movement. In the 1980s, it began to admit black African students in defiance of government policy. From early on, UWC accommodated adult learners through evening classes, which were set up to provide professional development services to teachers and other civil servants.

UWC's accredited part-time studies provision is about 37 years old and is the largest part-time university provision in the Western Cape. Part-time studies followed a pattern similar to that at other historically black institutions, which provided education to upgrade teachers, nurses, and other civil servants for the apartheid government. The programmes are run through faculties.

In 1997, a University Mission Initiative on Lifelong Learning (UMILL) was established within the Vice-Chancellor's office and scarce resources were made available to support it. This eventually led to the establishment of a new organizational structure, the Division for Lifelong Learning (DLL), which works across faculties to support the implementation of the lifelong learning mission and provides an institutional home for the development of RPL.

It is important to locate the decision taken in 1997 in the context of the time. Student numbers had been falling consistently and there were predictions of a headcount of only 6000 students in 1999. Over 40 academics were retrenched in June of that year and the trade union, NEHAWU, was on strike to resist the laying off of their members. There were crisis meetings of Senate and a proposed vote of no confidence in the Rector was narrowly averted. There were major changes within the executive leadership with several temporary appointees. It is fair to say that the institution was in crisis.

The spread of part-time students across faculties in 2004 is: Economic and Management Sciences (32.2%), Education (31.9%), Arts (10.1%), Law (8.8%), Community and Health Sciences (7.9%), Dentistry (6.6%) and Science (2.5%). The growth in Education and Dentistry has been the most dramatic particularly through the introduction of one-year professional development programmes. There is, however, no specific institution-wide monitoring of what programmes or courses are presented, or in what mode. This does not help students in their planning, particularly when they wish to access courses across faculties.

Three programmes were analysed in order to obtain data on issues of access, equity and success. These are: School of Public Health, Department of Management, and the Department of English which offers both regular English degree courses and English for Educational Development (EED) across the campus.

From this case study, there are several key considerations when confronting questions of access, equity and success of adult learners:

6.2.1. SUPPORT OF HOME, WORK AND INSTITUTION

Most part-time students[25] at UWC are employed and embody the linkage between tertiary education and the world of work. To help students succeed, relationships with workplaces need to be nurtured, so that workplaces can support adult learners, even indirectly (Joe's example of computer access at work is a case in point). The timing of payment of fees in relation to other financial responsibilities is an institutional example.

6.2.2. PEDAGOGICAL FLEXIBILITY

A growing number of programmes at UWC are using "mixed modes" for delivery and this should be encouraged, as adult students require flexible ways to access learning opportunities. The rigid distinction being made at national level between distance and residential modes of delivery is causing some concern in the institution and requires clarification.

6.2.3. STUDENT DEVELOPMENT AND SUPPORT

Very few part-time students have used the counselling services (7%) or the Writing Centre (24%). There seems to be a need for different kinds of support relating to, for example, financial planning advice, and to skills in negotiating with family and work for time and support. While certain services do need to be made available after hours, there is need for further research to ascertain more precisely what is needed, and when. It cannot be assumed that part-time, older learners have the same needs as younger, full-time students.

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[25] A survey among part-time students conducted in June/July 2003 found that more than 90% were employed.

6.2.4. STUDENT RETENTION

Institutional factors in relation to services, relevant curricula, appropriate pedagogical practices, and a sense of a learning community, all make important contributions to retention of adult learners. With regard to success, internal research has been conducted on RPL students. A comparative study to see how the different modes of access compare, found that RPL students perform as well as the students with Matriculation Exemption. The first intake of RPL students also scored on average 5% above the class average, and these were the top achievers in some modules.

6.2.5. ORGANIZATIONAL CHANGE AND LEADERSHIP

In order to ensure that the institution is able to adapt to provide quality services to adult learners, there does need to be recognition from leadership that changes must be made in administration, teaching and learning, and service provision. There is a danger of adult learners being courted only in times of diminishing numbers. For this not to happen, requires concerted commitment from leadership, as the UWC case demonstrates. The institutional changes need to be addressed deliberately and the role of a central, catalytic organizational structure, in the form of the DLL, has been essential in this process.

6.3. UNIVERSITY OF THE WITWATERSRAND

In the late 1990s, under the combined pressures of national transformation, institutional restructuring, and a leadership imbroglio, registrations of full-time students declined at Wits. At the same time, the composition of the student body was changing, as increasing numbers of black students entered the institution. Throughout the 1990s, the university gave attention to the development of bridging and foundation courses at undergraduate level for (mainly) black students who spoke English as a second language, and who had been educated in disadvantaged schools. These developments were consistent with Wits's reputation as an "open" university with a liberal ethos, ready to meet new national challenges.

Until the 1990s, it was the University's custom to select full-time students from the available pool of young, mainly white Matriculants/school leavers who had graduated from respected high schools throughout the country. Wits's strategy was to recruit widely at undergraduate level, then gradually eliminate students until there was a smaller pool of capable postgraduate students who needed very little academic support. A change of strategy was indicated in the Wits Strategic Plan, Shaping the Future 2002-2005 (University of the Witwatersrand, 2002), which announced the University's intention of becoming a more student-centred, flexible institution, which 'broadens access to Wits qualifications where appropriate'. Yet, despite the government's appeal to broaden access to higher education for adult learners and workers, and Wits's stated intention to do so, at least four factors militated against a change of institutional policy: Wits's identity and renewed designation as a 'research university' (DoE, 2001b); changes to the government's funding formula for degrees and diplomas; the labour-intensive nature of mounting programmes responsive to the needs and interests of adult learners; and government emphasis on student retention and throughput rather than access.

There is an interesting, if fragmented, history of recruiting mature adult learners as students at Wits. Veterans of World War Two were granted access to degree and diploma programmes at the University free of charge from 1946. Their experience was recognized as a proxy for academic admissions requirements, anticipating RPL by four or five decades. Throughout the 1980s, the Faculty of Commerce ran a successful programme of after-hours, part-time studies, which allowed working adults to accumulate credits towards a B.Com degree. The administration of this programme became burdensome, and it was discontinued in the early 1990s. The Centre for Continuing Education offered public lectures and short courses on a wide variety of topics in winter and summer schools throughout the 1980s and early 1990s. Certificate courses in Youth Development, Leadership, Rural Education, English, Science and Adult Education were offered. Many of these adult learner focused programmes ground to a halt in the early 1990s, when corporate and foreign funding agents shifted their support from NGO, community and HE projects to government-sponsored programmes. There was also a perception that the university campus, located on the fringe of the decaying inner city, had become unsafe at night. Competition from private colleges, especially in the fields of commerce, management and human resources development, siphoned off many potential adult students.

Throughout the 1990s, there was no particular innovation with respect to the recruitment of mature adult learners at the university, nor flexibility as far as access routes at undergraduate level was concerned. As is the case in many other South African institutions, there is tension between those staff members who are bent on preserving the institution's academic standards and traditional ways of operating, and those who wish to widen access to new groups of students and develop new approaches to teaching and learning.

Two programmes, demonstrating innovation with respect to adult learners at Wits University, formed part of the case study. These programmes are located in the Centre for Part-Time Studies (WitsPlus), and Journalism and Media Studies, a unit in the Graduate School of the Faculty of Humanities.

A number of issues emerge from the Wits case study:

6.3.1. ADULT LEARNERS

Working adult learners are recruited to both Wits Plus and Journalism and Media Studies. In the main, adult learners are motivated to upgrade and re-skill in their current professions. They are employed on a fulltime basis, and, in many cases, qualify for financial assistance from their employer provided they study in a field relevant to their work.

The academic staff of the two programmes recognizes that adult learners have roles and responsibilities outside the academic programmes in which they are registered. These roles and responsibilities are often seen as a nuisance and a distraction from learners' devotion to academic pursuits. Learners are generally perceived as having work experience which is an asset in terms of their ability to pay fees, and which provides useful contacts in the world of work. Adult learners are perceived to be more mature, motivated and committed to study than younger learners in the mainstream. However, their work-based knowledge and experience is not always positively or consistently recognized in the curriculum, particularly in WitsPlus.

Generally, adult learners in both programmes accepted the need to develop their academic skills, and found support to do this in structures such as the Writing Centre and academic development workshops, as well as from individual lecturers, tutors and course coordinators. The expectation is that students will become proficient in academic discourse in a short period of time in order to survive and succeed in academic study.

The study shows that white-collar workers and professionals gain access to Wits. Other potential students, for example, unemployed and blue-collar workers, or workers in the informal economy, do not access academic programmes at Wits. They are excluded because of the lack of bursaries for part-time students at Wits, and because they are seen as under-qualified academically.

6.3.2. FACILITIES AND SUPPORT STRUCTURES

Facilities and support structures are available for adult learners, but, like all services at the University, these are geared to full-time students who are on campus from 8h00 to 16h00. Some services, such as foundation courses, are vulnerable to budget cuts and altered priorities in the institution and the national Department of Education.

Both Journalism and Media Studies and WitsPlus provide dedicated student registration and counselling services, as well as facilities and WebCT support to adult learners, bypassing mainstream structures. This assisted students to feel affiliated to their programme. The inclusion of adult learners in niche or specialized programmes, and the way they are accommodated administratively and pedagogically, makes it possible for students to enter and flourish in such programmes. At the same time, the students become invisible, and the programmes look inward rather than outward. Both students and programmes become marginal (and dispensable) in the wider university.

6.3.3. THE ROLE OF EMPLOYERS IN THE ACCESS AND RETENTION OF ADULT LEARNERS IN HIGHER EDUCATION

Employers have a key role to play in the access and retention of adult students in higher education. Policy documents and other literature on adult learners tend to emphasize the role of the receiving institution, its ethos, its inclination to pedagogical reform and support mechanisms as significant variables in student performance. By way of contrast, the Journalism and Media Studies programme suggests that the employers have an equally significant role to play in the success and retention of adult learners in higher education. Part of the employers' role is the financial support they offer, which allows their employees to access and complete higher education qualifications. A related area is the technical support that the work environment provides in the form of the availability of computers, Internet and e-mail services. It appears that these services allow adult learners to access web-based course materials on the job, allowing them to save time – a rare commodity in the lives of adult learners.

6.3.4. CHALLENGES WITH RESPECT TO ADULT LEARNERS

Dedicated programmes for adult learners were established in response to particular contextual circumstances: the decline in student registrations in 1999-2001 and in response to policy calls for widening access to higher education (in the NPHE). These two factors made it possible for adult learner-focused programmes to be established. Once they were established, other factors made it difficult for them to flourish. The absence of a coherent institutional strategy for adult learners; changes in the government's funding formula in higher education; the labour-intensive nature of mounting programmes, which are responsive to adult learners' needs and interests; and the new emphasis in government and institutional policy on student retention and throughput rather than on access, all impede the equity, access and success of adult learners in higher education.

7. ISSUES EMERGING ACROSS THE CASE STUDIES AND HEMIS DATA

All three case study institutions show uneven treatment of adult learners, with pockets of good practice. They cannot be seen as uniform in their approaches to adult learners. Each institution has a distinct history, identity, mission and relationship with its surrounding communities, shaped by its position within the South African and provincial higher education landscapes. Despite these differences, attracting adult learners is not a strategic imperative of any of the three institutions, although UWC has the strongest and most effective commitment to lifelong learning.

7.1. UNDERSTANDING ADULT PARTICIPATION RATES AND THE 'ADULT LEARNER'

As the research findings show, the percentage of learners over the age of 23 in South African public HEIs is greater than 50% − a significant number – and a rate similar to that of Europe and North America. McGivney (2004: 34) points out, in relation to student numbers in the UK, that about half of all learners in higher education are over 25.

In terms of understanding some of the characteristics of adult learners, the case study data begins to paint a picture of adult learners in South Africa as coming from lower middle-class socio-economic backgrounds, mainly black and first generation university students. Most are in their twenties and thirties and are married or have family responsibilities. Most are in full-time employment, although there are significant numbers of unemployed adult learners at VUT, which also has a relatively high proportion of +23 learners from rural areas.

The dominant motivation of the adult learners interviewed in all three institutions was career progression and job security. In addition, learners in all three institutions felt that the tide, which had previously prevented them from entering higher education, had turned, and their time to study had come. This research suggests that those adult learners who access HE are employed, either in technical and commercial fields, or in professional fields, such as teaching and nursing. While adult learners are accessing higher education, they are not necessarily "workers".

7.2. UNDERSTANDING ACCESS AND BARRIERS

At programme and service levels, adult student satisfaction was high in most of the programmes studied. Students felt that they were acknowledged and accommodated as adult learners by lecturers and administrators, particularly in those programmes especially designed for them. However, they also noted that the institutions, on the whole, made few concessions to them.

With regard to the conceptual categories relating to access, as presented in the literature review, this research has identified mainly situational barriers to access (Cross, 1981) for adult learners, especially lack of finance, study leave and transport. In particular, the participation patterns suggest that there is a strong economic motivation influencing adult learner participation in higher education, yet adult learners interviewed indicated that finance was a huge issue affecting their participation.

Understanding situational barriers and solutions to these issues cannot be reduced to only the personal circumstances of individual learners. Financial support, for example, needs to be examined in a broader context. At the level of State financial support, it would appear that the National Student Financial Aid Scheme (NSFAS) is not being utilized for adult learners studying part-time, especially those who are working, as they are not likely to meet the NSFAS means test. However, given the recent debate on first year pass rates and costs to the State, some review of national aid to adult learners (whose graduation rates appear to be better than their younger counterparts in this study) is recommended.

Another aspect of the financial barrier/support issue relates to workplace support, and the need for effective relationships between workplaces and higher education. This study showed that most of the students interviewed across the three institutions are employed, and for many, their field of study is related to their work. Yet the financial support they receive from their workplaces is quite varied. The VUT case, for example, revealed that nurses currently struggle to get financial support from their employers, whereas in the past financial support for continuing nursing education was institutionalized.

The issue of employer funding raises the related issue of funding available through the Sector Education and Training Authorities (SETAs). The WitsPlus programme coordinator suggested that funding for workplace skills is being used for training, rather than education. Short courses show high recruitment levels compared to degree or diploma programmes, and there is a growing emphasis on short duration certificate courses (which are often funded by employers and/or through SETA levy funds).

At institutional level, many HEIs do not recognize the relationship of continuing education (often manifested as short course provision) to formal degrees and qualifications through, for example, giving credit for prior learning. Institutions are still cautious about RPL and only implement it within certain professional development and/or postgraduate programmes. While UWC has a record of broad-based RPL practices, both VUT and Wits use RPL selectively and not at the undergraduate levels. It has not been used for equity and redress purposes. The idea of institutionalizing RPL as a way of reducing the cost of programmes for adult learners is not an issue that has been taken up by institutions.
In this study, issues of epistemological access, as defined by Morrow (1993/4), did not appear to emerge as a barrier for adult learners, except, perhaps, for adult learners doing the B.Com option at WitsPlus. In that programme, epistemological access related to the access requirements of Foundational Mathematics, and the inclusion of a core course on Computational Mathematics in the curriculum.

However, if epistemological access is included in those practices relating to teaching and learning by staff and institutions, then this research raises important issues about the relationship between departmental/school practices and student success. For example, none of the case studies show evidence of employing staff skilled in adult education theory and practice, and nor is there a relationship between those departments where there are large numbers of adult learners, and departments of adult education (where, it may be assumed, an expertise in developing and running courses for adult learners is located). Issues relating to staff development do not feature, and this in turn, raises questions about the quality of programmes being offered to adults (and not just at the case study institutions), in pedagogical and curriculum terms.

Finally, (female) students doing VUT's Higher Diploma in Clinical Nursing (HDCN) point to the issue of affiliation needs (Belenky, *et al.,* 1986; Hayes & Flannery 2000) in that these nurses pointed to the importance of having lecturers with whom they could form personal mentoring relationships.

7.3. UNDERSTANDING SUCCESS

Consonant with the international research literature, the adult learners in this study are juggling family, work and community responsibilities alongside their study commitments. The findings show that adult learners are highly motivated, and adept at juggling these various and competing responsibilities. All three case studies and the selected programmes generally demonstrate both high retention rates and higher graduation rates when compared to younger cohorts of students.

7.4. INSTITUTIONAL CONTEXTS AND RESPONSIVENESS TO ADULT LEARNERS

The research raises issues relating to the notion of differentiation. As with the UK experience, South African public higher education institutions are differentiated according to (perceived and actual) levels of status. For example, the University of the Witwatersrand has traditionally been seen as one of South Africa's elite institutions, while the former tecknikons and former apartheid-designated institutions have been relegated to a lower status. VUT, as a former designated 'white' institution, would also have a relatively higher status within the former technikon hierarchy. While the restructuring of the higher education system has seen many shifts in perceived status, some of this history still influences individual institutional responses to issues like admissions, widening access, and institutional change at the level of curriculum and pedagogy.

The case studies show a range of institutional approaches that enable adult learners to participate in higher education. At UWC, there is an integrated institutional response from the top, which strives to facilitate access and to enhance the quality of part-time programmes. In the UWC approach, adult learners are integrated across the institution and its programmes, and a unit has been established to oversee aspects of that integration and to provide for the monitoring and tracking of adult learners. This approach would be consistent with UWC's history and vision of itself as an institution 'for the people'.

At WitsPlus, innovations with regard to the access, equity and success of adult learners are ironic in that they nurture adult learners and demonstrate good practice while at the same time they appear to go against the grain of mainstream institutional practices. Their differentiation of themselves from mainstream practice militates against their voices being heard, and their practices being further institutionalized in the university[26] – this scenario is not unlike the picture painted by Usher *et al.* (1997), who attempted to explain the relative marginalisation of adult education within university contexts. However, Wits's approach to admitting adult learners, albeit only on the periphery, is perhaps consistent with its vision of being a research led, elite institution. This argument can be supported through a review of the spread of adult learners, across undergraduate and postgraduate programmes. Another aspect of Wits' marginal treatment of the adult learners in WitsPlus relates to the programme rules that stipulate that unless a certain level of grade is achieved, WitsPlus students cannot 'transfer' within the institution to the equivalent full-time programme, despite the fact that the programmes are supposed to be equivalent.

At VUT, initiatives to attract adult learners are largely driven at faculty or departmental level, and are more apparent at the post-basic level. It seems that the high percentage of adult learners in undergraduate programmes is unrecognized in the institution. While VUT has significantly widened access to formerly disadvantaged groups, it is at this institution that the anomalies of age and the definition of adult learner are most sharply delineated.

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[26] In contrast to WitsPlus, the Wits Business and Medical Schools are similarly distanced from the mainstream, but protected by their high-income generation.

[27] The large numbers of adult learners in South African public HEIs are also true of those institutions that seem to perceive themselves as targeting the 'cream' of traditional age school-leavers and/or those as being research-led (and which may therefore see themselves as more prestigious).

In general, the data shows that a lack of institutionalization and institutional commitment seems to result in the vulnerability of the programmes serving adult learners. It can therefore be argued that this points to the need for constant vigilance and advocacy in order to protect both the programmes and the place of adult learners within higher education.

8. CONCLUDING REMARKS AND OBSERVATIONS

This study on equity, access and success of adult learners in higher education demonstrates the far-reaching implications of accepting adult learners as a serious constituency within institutions. In a context in which there are many competing priorities, and resources are limited, yet where adult learners appear in significant numbers in all public HEIs,[27] it is decision-making specifically in relation to funding and subsidy allocations, there is clearly a need for a centralised database that can also adequately support systems-level research and the tracking and monitoring of broader trends relating to adult learners.

8.1. FUNDING ADULT PROGRAMMES

As a strategy for encouraging social inclusion and widening access, the question arises as to whether access for adult learners only be granted by certain institutions, institutional types or programmes. The answer is probably not. In the UK, funding grants are provided for increasing access to institutions with relevant programmes. These grants are then used to ensure that the institutions provide appropriate services for adult learners, and to improve the quality of programmes. Given that the *White Paper 3* (DoE, 1997) makes provision for changes in the funding formula for earmarked funds for developmental work, this may be one strategy for ensuring equitable access and quality for adult learners across the HE landscape (although this has not happened in nine years). In this way, those pockets of good practice (some of which have been illustrated by this research) will be encouraged to flourish, while protecting programmes and initiatives from the vagaries of ‘convenient’ policy changes when institutions are under threat, financially or otherwise.

8.2. JOINED-UP THINKING

This study suggests the need for ‘joined-up thinking’, which refers to the cycle of life and the interconnectedness of each stage of living and learning. It matters what the relationships are between the different parts of the educational system and the relationships between different systems, so horizontal and vertical linkages between HEIs and schools and FET colleges, and between HEIs and workplaces or communities, are important. Mechanisms to encourage these are necessary in an environment where different parts of the system operate in isolation. Adult learners require flexibility and mobility to move in and out of work and study. This requires, in some instances, that the criteria of success need to be rethought – for example, not to penalize institutions if a learner “stops out” of study for a period of time.

8.3. INSTITUTIONAL LEVEL SHIFTS

This research has made it clear that if institutions are to take adult learners more seriously as a constituency, they need to undertake improvements to their monitoring systems, central administration and aspects of provisioning (although these improvements will facilitate an understanding of and flexibility for all categories of student). The difficulties with not only systemic data (HEMIS), but also individual institutions' MIS indicate that investing in improved IT systems and more powerful databases is necessary to track and monitor students generally as well as specific categories, in particular, among other things.

Whatever the 'model' of providing access for adult learners, institutions need to ensure that institutional support and commitment is provided to those students, programmes and staff. Potentially unfair or discriminatory practices need to be identified and dealt with. This, in turn, highlights the need for institutionally supported research into the practices of the institution and the experiences and perceptions of its (various categories of) students and staff.

8.4. THE NEED FOR MORE RESEARCH

One of the significant outcomes of this research is the poor state of quantitative data from which to draw inferences and conclusions. The quality and reliability of the HEMIS data is cause for concern. While the research set out to provide a macro picture of adult learners in HE, it soon became clear that this was not possible. This pushed the researchers to develop the case studies, with both merits and limits.

One outcome of this research is the need for regular, reliable data on the age and working lives of students. Some ideas for further research include studies to:

- establish the age profiles and study patterns of students in a range of HEIs across different +23 age groups, as this data needs far more disaggregation. Such research should inform debates and policy about the (re)definition of the current categories of 'mature age exemption';
- understand the relationship between work and study and the barriers or incentives to enabling working students to study successfully;
- understand the adult learner or prospective learner, identifying social characteristics of participants and non-participants, investigating the factors associated with the decision to participate or not, and analysing the experiences, expectations and perceptions of the learners;
- clarify what it is that propels people across ages successfully through higher education, and what inhibits this progress;
- analyse the meaning of being a 'part-time' student and to question the value of the definition of 'part-time' for funding and other purposes;
- understand how HIV/AIDS is impacting women and men at different ages, in different regions and to project the implications of this for access to HE for adult learners;
- research and develop teaching/learning innovations;
- research and develop supportive institutional cultures for adult learners;
- understand who is being excluded and unable to gain access to HE; and
- understand why there is seemingly so little interest, on the part of HEIs, in 'non-traditional' students when the policy states otherwise.

8.5. CONCLUSION

In a context where there are multiple, competing priorities and scarce resources, adult learners are seemingly not a priority. However, the education of adults in a society, such as South Africa is a political, moral, historical and economic issue – and it is not merely one of these, but all of them. Adults have a critical role to play in the development of South Africa because of their accumulated knowledge and experience, which can be mediated by educational processes to strengthen it and make it socially useful. Bringing adult learning into the domain of higher education is consistent with the purposes of higher education as spelled out in the *White Paper 3* (DoE, 1997).

This study helps to move adult learners from the margins by making them visible in higher education in a situation where over 50% of students (80% being at undergraduate levels) are over 23 years of age. In a context where the increase in the efficiency of the HE system is paramount, taking the learning needs of adult learners seriously is compelling. In a situation where the national human resources development strategy has identified the professional development of large cohorts of working people as a necessity, the need for HEIs to learn to do this well is essential.

However, access to higher education in the large numbers demonstrated is not sufficient, as adult learners also raise pedagogical challenges that need to be confronted more fully by HEIs. This is also an important issue for society, because it speaks to the question of whose and what knowledge is privileged in society, and how accumulated experience is used as part of collective social knowledge. Collective social knowledge is important to social development, and should therefore be developed and advanced in ways that strengthen its self-critical nature, its ability to add to social knowledge more generally, and to 'contest with' other knowledge – a role that could be played, in part, by higher education.

This study suggests that to attain access, equity and success for adult learners in higher education deep transformation is required from the micro teaching/learning relationships, to the meso-institutional cultures, to the macro provincial and national environments. Rather than the leadership of the institutions and the system being overwhelmed by the extent of the changes needed within a resource-constrained environment, it may well be advisable to identify and to provide incentives for institutions and programmes that can spin networks of good practice which can infuse and inspire the system over time, thereby contributing to both social and economic development goals.

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