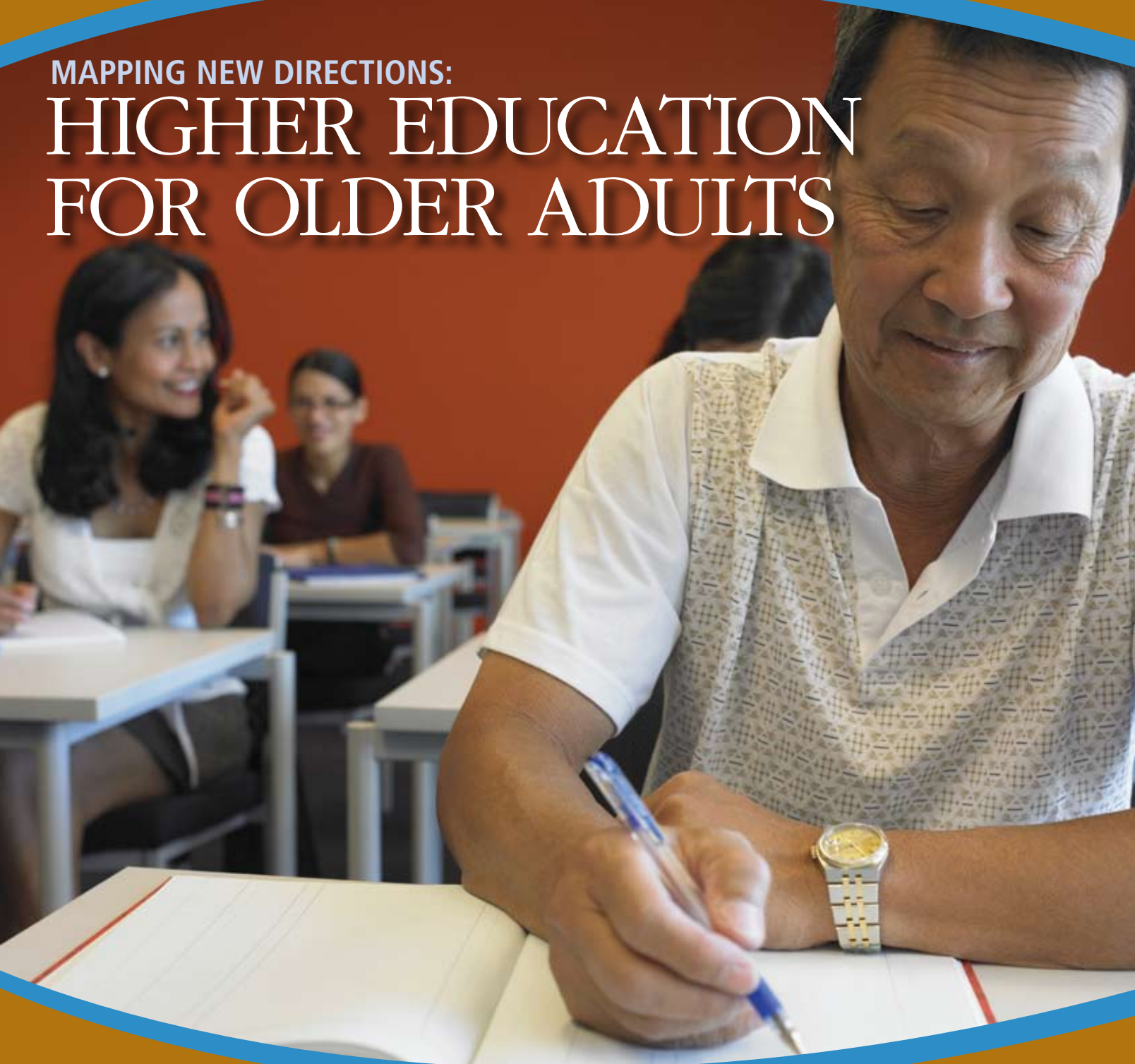


SECOND REPORT  
REINVESTING IN THE THIRD AGE: Older Adults and Higher Education

MAPPING NEW DIRECTIONS:  
**HIGHER EDUCATION  
FOR OLDER ADULTS**



**ACE** AMERICAN COUNCIL ON EDUCATION  
® The Unifying Voice for Higher Education

**MetLife Foundation**

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## About ACE

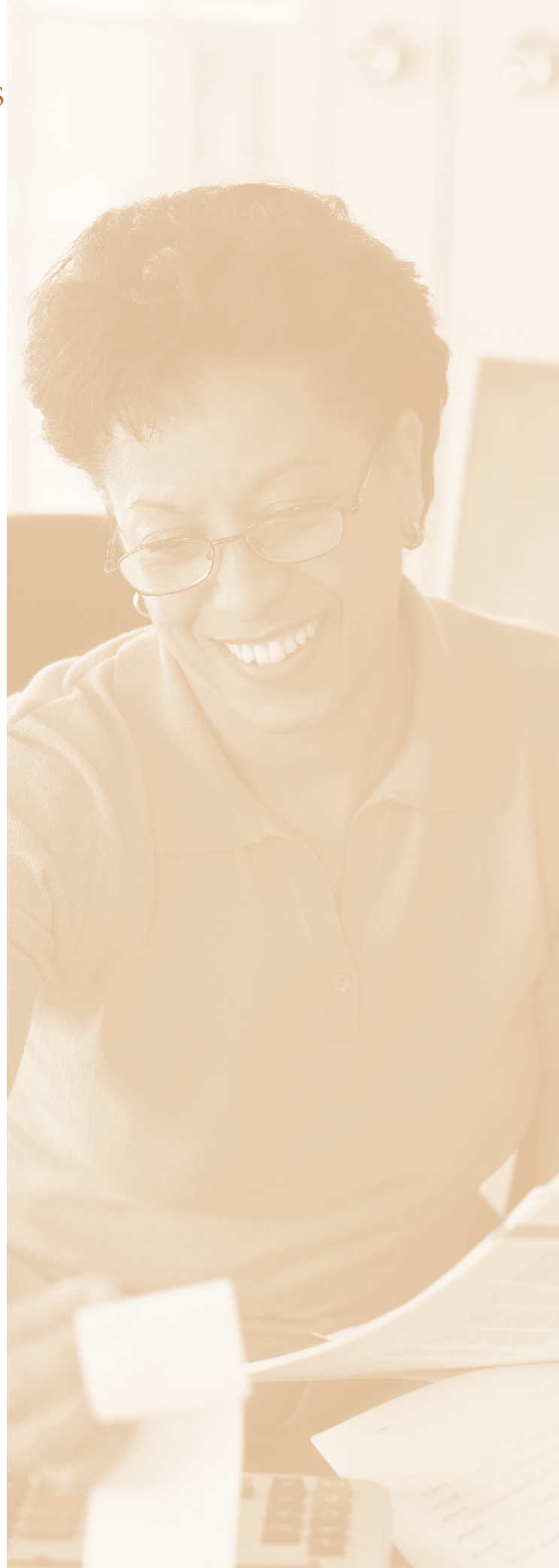
The American Council on Education (ACE) is the major coordinating body for higher education, representing all sectors, including public, private, two-year, and four-year institutions. Members include approximately 1,600 accredited, degree-granting colleges and universities and also 200 higher education–related associations, organizations, foundations, and corporations. Three strategic priorities drive the Council's activities: representation, leadership, and service. ACE's four areas of focus include access, success, equity, and diversity; lifelong learning; internationalization; and institutional effectiveness. For further information, please see [www.acenet.edu](http://www.acenet.edu).

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## Preface

**MAPPING NEW DIRECTIONS:**  
Higher Education for Older Adults

Dear Colleague,

We are a nation that's aging. Recently released data from the U.S. Census Bureau predict that the population of adults aged 65 and older will more than double—from 40 million to more than 88 million—between 2010 and 2050 (U.S. Census Bureau, 2008). As the volume of national discussions on aging and its implications has risen in recent years, so has the catalog of concerns: workforce shortages, increasing numbers of retirees, skyrocketing health-care costs, and quality of life for elders—along with global economic instability.

But the news is not all bad. In fact, older adults can play a key role in addressing many of the concerns that stem from their growing numbers. Many communities see benefits to attracting a growing share of older adults—who often are well-educated, affluent, and still in the workforce—as well as to improving the well-being of those residents who decide to age in place.

At the same time, we know the majority of older adults have never participated in postsecondary education and are not currently engaged in lifelong learning. To call national attention to the educational needs of older adults, the American Council on Education (ACE) initiated a two-year research project, **Reinvesting in the Third Age: Older Adults and Higher Education**, funded by MetLife Foundation. The first report, *Framing New Terrain: Older Adults and Higher Education*, published in October 2007, offered a more complete picture of older adults than what had previously been known: what drives them to lifelong learning, as well as what keeps them away. Since the release of *Framing New Terrain*, the project has held two focus groups of older adults, conducted a nationwide institutional survey, and convened two regional roundtables of higher education and other sector leaders—all of which are analyzed and discussed in this final report, *Mapping New Directions: Higher Education for Older Adults*.

From this research, it is evident that higher education institutions are exceptionally positioned to create new frameworks for this population. Through interdisciplinary research, numerous institutions are already bridging knowledge gaps about aging and drawing attention to the benefits of lifelong learning for older adults' health and cognition. In recent years, colleges and universities have also helped expand local and regional awareness through forums and other gatherings designed to advance the conversation about aging.

But as both employers and providers of education and training, institutions can still do more. Through partnerships with other sectors, they can craft effective strategies to reach greater numbers of older adults, as well as develop funding options to serve this population. Finally, higher education can offer community leadership by devising new learning formats to meet the rapidly changing needs and expectations of older adults. And, with 49 percent of their ranks aged 61 or older, presidents and chancellors can apply their own insights on aging and transitions to help their institutions shift perspective and practice.

I invite you to read *Mapping New Directions* and to share its findings and recommendations with members of your campus and community. As this report reveals, meeting older adults' needs is just one more way colleges and universities can become true lifelong learning institutions—recognizing the varied learning needs of each individual student and working to make higher education a reality for them. In the end, that is what we all strive to achieve.

Molly Corbett Broad  
President, American Council on Education



# Executive Summary

The skyrocketing growth of the older adult population in the United States is forcing society to rethink this cohort's role in the nation's future. While policy experts, the media, and demographers have emphasized the challenges of this aging population—including strains on the health care system, social security, and the economy when mass retirements ensue—less attention has been paid to the promise it brings. This is especially true in higher education, where adults aged 50 and older represent 3.8 percent of the 17 million students nationwide who are enrolled in for-credit courses at degree-granting colleges and universities (U.S. Department of Education, 2005). If three in ten Americans will be over the age of 55 by 2030 (U.S. Census Bureau, 2005)—and trends in delayed retirement and workforce shortages continue—then higher education must find ways to better serve this huge pool of potential learners.

Beneath the national data lie the stories of older adults who live in our communities, from established cities to rapidly developing metro areas to sprawling exurbs. By all accounts, this group is “a very fast-moving target, with changing behavioral and lifestyle patterns” (Toft, April 2008). As such, these adults want mobility and connection across the spheres of work, family, education, and community. To better serve them, postsecondary education must pay attention to new markers that indicate how older adults see themselves as learners and what propels them to lifelong learning. Further, colleges and universities must ask themselves: how do we perceive older adults? How do our perceptions affect the means and messages for outreach? What programs and services do we currently offer to help older adults in life and work transitions? What options for financial assistance are available to broaden access to underrepresented groups of older adults?

To answer these questions, *Mapping New Directions: Higher Education for Older Adults* draws on more than a year's worth of research conducted by ACE's Center for Lifelong Learning, and funded by MetLife Foundation. From the insights of focus groups of older adults, a nationwide survey of postsecondary education institutions, and regional roundtable discussions of higher education and other sector leaders, this

report offers a more complete picture of how higher education is serving this demographic. It also suggests what higher education can do to recognize the markers and keep this fast-moving target in its sights.

## Highlights from *Mapping New Directions*

- **Where older adults learn:** Currently, older adults are more likely to be served by community colleges than are students under the age of 25. While only 33 percent of students under the age of 25 attend community colleges, half of the college-going adults aged 50 and older do so.
- **What drives their learning:** Focus groups of older adults described three primary motivators for pursuing lifelong learning: learning to learn, learning to connect, and learning to work. Although each of these motivators can stand alone, focus group comments revealed that the drive to learn for older adults is not singular, linear, or even sequential.
- **What they learn:** In a national survey of higher education institutions across sectors, respondents reported that the top five programs enrolling older adult students were fine arts/humanities, business management and entrepreneurship, human services and counseling, teacher education, and health services.
- **What they want to be called:** Language plays a significant role in the effectiveness of outreach messages. Most focus group participants said that programs targeted specifically toward *seniors* or *older adults* wouldn't catch their attention because they didn't identify themselves as part of that population. Terms such as *third age* and *lifelong learning* are appealing to older adults across age cohorts because they imply a continuum of learning.
- **How higher education identifies them:** The nationwide survey results indicated that older adults are not consistently identified by colleges and universities, if at all. More than 40 percent of responding institutions reported that they did not identify older adult students for purposes related to outreach, programs and services, or financial aid.

- ▶ **How higher education connects to them:** Because older adults who already have a college degree are more likely to seek lifelong learning programs on college campuses, institutions must demystify higher education in order to reach adults who have never participated in higher education.
- ▶ **How higher education serves them:** Institutions identified a range of programs and services available to this age group—such as computer training (67 percent); career transition (48 percent); ESL (39 percent); and GED®/Basic Skills (36 percent). Yet 42 percent of respondents also estimated that less than 10 percent of their older adult students make use of such services.
- ▶ **Who they want for classmates:** Focus group members said that they preferred intergenerational learning to age-segregated education. The prevailing attitude among these adults was that both older and younger students can learn from one another; they had no desire to be sequestered in an “educational nursing home.”
- ▶ **How they pay for higher education:** Older adults are often unaware of financial assistance for the education of older adults, due in large part to lack of promotion by the institutions. For example, of those institutions offering tuition waivers for older adults, most reported 50 or fewer students taking advantage of the waivers as of 2006.
- ▶ **Chunk it:** Higher education must rethink program delivery formats. Instead of delivering linear certificate and degree programs, colleges and universities need to find ways to deliver education in chunks, or *skill-ettes*, so that older adults can easily acquire education for new careers or existing jobs.
- ▶ **Adapt it:** Higher education should consider adapting existing programs and services to accommodate older adults. Financing models such as lifelong learning accounts and lottery-funded scholarships, for example, can be used to create reliable funding streams for older adult education. Prior learning assessment, internships, and career management are other services that can be adapted to help move older adults into higher education and the workplace more efficiently.
- ▶ **Expand it:** Higher education could be the best place to deliver life-planning tools that help older adults (and everyone else) learn about aging and managing life transitions. Further, meeting older adults’ needs and expectations for work and life transitions—with expanded outreach, varied programs and venues, and transportation options, among others—would benefit other students as well.

These findings, among others in the report, illustrate the complexity of this population and the challenges that face institutions as they strive to serve older adults at different points along the learning continuum. The research also suggested four key recommendations to guide higher education as it works to create viable approaches:

- ▶ **Research it:** In order to find their niches, individual institutions must conduct their own research to identify existing programs and services, as well as gaps and opportunities, both on their campuses and in their communities.

Each of these recommendations gives shape to the idea of what higher education could become for older adults. They also demonstrate that, while the aging demographic is a national issue, its effect is localized—and so must be the solutions. Higher education’s role in serving older adults might not yet be defined, but the markers are there: the need for mobility and connection, particularly for the hard-to-reach segments of the older adult population; the range and complexity of drivers that push older adults toward lifelong learning; and the changing behaviors and lifestyle patterns that define this “moving target.” It is only in recognizing these markers and then drawing lines accordingly that a clear map for older adults in higher education can emerge.

# Introduction

One in five Americans is over the age of 55, and that number will increase 50 percent by 2030 (U.S. Census Bureau, 2005). Demographers, researchers, and policy experts have emphasized how this aging demographic will change the face of our society in numerous ways, from threatening the country's economic stability, to straining the resources of communities across the nation. But this is only part of the picture. The public in general and higher education in particular have yet to recognize the promise and benefits of this population shift.

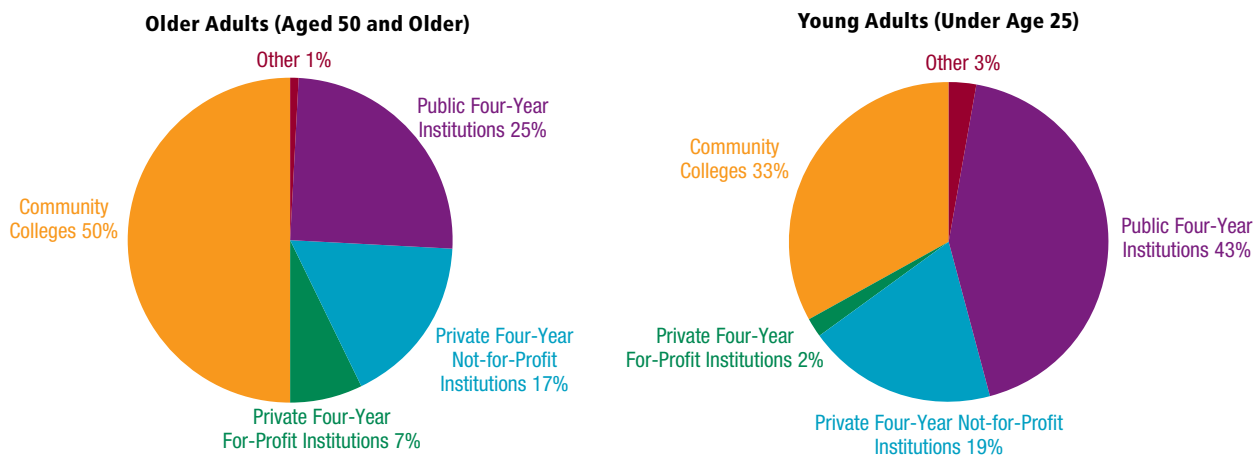
Older adults currently represent a very small percentage of students enrolled in for-credit courses at degree-granting institutions of higher education. Of the 17 million students served by higher education institutions (as of 2005), only 3.8 percent are 50 years or older, while 61 percent are under the age of 25 (U.S. Department of Education, 2005). Half of college-going adults who are 50 or older are enrolled in community colleges, compared with just 33 percent of adults aged 25 and younger. Older adults are also more likely to attend private, for-profit institutions (7 percent) than their younger counterparts (2 percent) (see **Figure 1**). In addition, the percentage of enrollment varies by institutional type, from 2 percent to 6 percent (see **Figure 2 on next page**). While these figures do not include the number of older adults enrolled in noncredit and other lifelong learning courses sponsored by community

colleges and other colleges and universities, they do indicate that postsecondary institutions have much to learn about older adults' educational needs and expectations, as well as about outreach strategies, programs and services, and financial assistance that would expand participation.

To better assess this shifting landscape, ACE's Reinvesting in the Third Age project, funded by MetLife Foundation, published a report in 2007—*Framing New Terrain: Older Adults and Higher Education*—that took a close look at the older adult population, aged 55–79, and its relationship to higher education. (See Appendix 2 for summary.) Drawing on a comprehensive review of current research, *Framing New Terrain* examined this population's motivations for participating in higher education and the obstacles they encounter. It identified the challenges facing colleges and universities to craft effective outreach strategies, create programs and services in an environment of shifting demands, and discover financing options that broaden access to this population and, at the same time, help institutions sustain these programs and services. While that report helped frame the older adult population in relation to higher education, it raised more questions, namely: What do older adults themselves have to say about higher education? And how exactly are colleges and universities serving this population, if at all?

**Figure 1: The Places to Be: Institutions Serving College-Going Older Adults, Compared With Their Younger Counterparts: 2005**

Source: U.S. Department of Education, National Center for Education Statistics. Integrated Postsecondary Education Data System. Fall Enrollment Survey, 2005. (Analysis by the Center for Policy Analysis at ACE).



To answer these questions, Reinvesting in the Third Age convened two focus groups of older adults in fall 2007, conducted a national survey of higher education institutions in early 2008, and held roundtable discussions of higher education and other sector leaders in spring 2008. The two focus groups of 10 to 15 adults ranging in age from 55 to 81 years were asked what draws them to lifelong learning *and* what keeps them away. One group included adults who were currently participating in higher education programs or had done so within the last 10 years; the other group included adults who had never participated in postsecondary programs, or had not done so within the last decade. Their comments, shared throughout this report, illuminate the data presented in the project's first report, and help frame new questions and insights about how they see themselves as learners and how higher education programs fit—or could fit—into their lives (see Appendix 1A for focus group participant demographics and list of questions).

Next, in a national survey of institutions across higher education sectors, ACE sought to learn more about three major challenges facing higher education when serving older adults: outreach, programs and services, and financing (see Appendix 1B for survey questions). *Mapping New Directions* analyzes survey findings to identify current campus practices, but also to assess informational gaps that could dilute program effectiveness in serving this group.

Finally, the two regional roundtables—one in Mesa, Arizona, hosted by Mesa Community College and the other in Indianapolis, Indiana, hosted by University of Indianapolis—brought together a total of 24 higher education, community and state government leaders, and researchers. Each roundtable

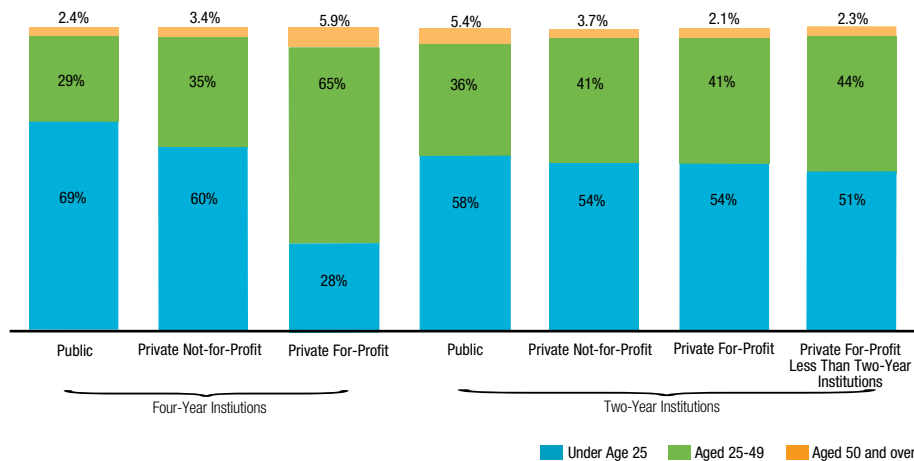
discussion focused on the shifting demographics on their campuses; which older student populations they were serving most effectively, which ones they weren't; and what policy changes are needed at the institutional, state, and federal levels to better serve their educational needs. Their comments, shared throughout this report, offer useful strategies—collaborative, integrative, and local—to identify and address lifelong learning issues for older adults (see Appendix 1C for lists of participants and roundtable discussion questions).

In addition, the focus group and roundtable discussions led us to examine another factor: identity—that is, how these adults view themselves as community members, workers, and learners; how they are viewed by colleges and universities; and how these perspectives interact to influence program development and participation. In particular, comments from the focus groups led to a clearer understanding of *why* they learn, and how these drivers emerge, integrate, and affect older adults' views about what they can do and learn.

From this research, we have compiled a richer, more detailed picture of this population, gained a more specific understanding of how it fits, or doesn't, into the higher education landscape, and identified particular areas in which more data are needed. By bringing it all together, *Mapping New Directions* creates a kind of lifelong learning map of this population. It's one that needs both markers and constant revision. As one roundtable participant said, this population is “a very fast-moving target, with changing behavioral and lifestyle patterns” (Toft, April 2008). Higher education's task is to find out how to move and change along with it.

**Figure 2: Where Older Adults Learn: Age Distribution of Enrollment, by Institutional Type: 2005**

Source: U.S. Department of Education, National Center for Education Statistics. Integrated Postsecondary Education Data System. Fall Enrollment Survey, 2005. (Analysis by the Center for Policy Analysis at ACE).



Note: Details may not total 100 percent due to rounding and a small percentage of students whose ages were unknown.



## Learning to Learn, Connect, and Work: Multiple Drivers for Older Adults

Older adults, like their younger counterparts, enter and exit higher education along a continuum, depending on their learning needs at certain points in their life. Comments from our focus groups presented a better understanding of these intrinsic drivers and underscored the importance of recognizing how they emerge and interact with one another. Without this understanding, postsecondary institutions often misread and inaccurately forecast the rapidly changing needs and expectations of this population.

What are the primary learning drivers for older adults? This report targets three: learning to learn, to connect, and to work. Some older adults learn for the sheer joy of it (“learning to learn”); others to facilitate a connection to other people or their communities (“learning to connect”); and others to advance their careers or pursue new ones (“learning to work”).

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Our focus group members, representing a broad cross-section of older adults with varying levels of educational attainment, work experience, and income, underscored how educational needs often overlap. As but one example, Deborah,<sup>1</sup> 55—who has a high school diploma, and has never participated in higher education—stated she wanted to learn “just for me,” but also to connect with other people and pursue a career. “I’m the CEO of my family,” she said. “I’ve got my mother on one side, and my son on the other. I’ve been out of the workforce for 23 years. I want to go back. . . . I want to know what’s out there, what there is to learn.”

## Learning to Learn

The focus group discussions illustrated the fact that older adults take seriously issues related to vital aging, quality of life, and well-being. They see lifelong learning as key to increasing a sense not only of who they are and what they can do, but as a way to help them manage the many transitions of aging. Rose, 79, while not participating in higher education programs, continues to pursue lifelong learning actively—from fitness classes to activities related to theater and current events. She also volunteers at senior centers in her community. “I’m recovering

“I wanted to keep the oatmeal stirred.”

—Focus group member (age 66)

from surgery, so as I get stronger, I’ll do more,” she said.

Similarly, Tim, 56, who is still in the workforce and engaged in higher education programs, sees learning as an integral part of his life, now and in the future: “In 10 years . . . I’ll still be taking courses. Because of the era [in which] I was raised—and I think you’ll find this from other people in this generation—I don’t want to sit and do nothing. I want to learn.”

That was the case for many of the focus group members, regardless of their employment status or education level. From the 66-year-old man who pursued education as a way to “stir the oatmeal,” to the woman in her early 70s who enrolled in computer classes “because I just got a computer and didn’t know anything about it,” these older adults see lifelong learning as one avenue for staying active and engaged. One 57-year-old participant summed up the experience of many focus group members when she said: “Going back to school has been a rejuvenating experience for me. . . . I really enjoy stretching my brain.”

Yet older adults who pursue education as a way to “stir the oatmeal” may discover additional drivers. After all, venturing into these “learning to learn” experiences often encourages them to engage in community work or re-engage in the workforce.

## Learning to Connect

Our focus group discussions proved that learning to connect with other people and com-

munities is a strong incentive among older adults who pursue higher education or other lifelong learning avenues. “One of the reasons I got involved [in a college community group] is because it brought together some entities of the culture that don’t get to be heard,” said Charles, a 66-year-old who is a higher education participant. “In small communities, you become isolated; there isn’t the cultural cross-fertilization. College brings different communities together.”

Focus group members who had participated in peer-to-peer programs appreciated the opportunity to “make friends and have fun” while learning with adults in the same age cohort. At the same time, many focus group members sought out intergenerational connections, demonstrating the strong conviction that younger

“My learning is tied to wanting to help people in the community. Clothe the naked, feed the hungry. That’s what I spend my time doing now.”

—Focus group member (age 71)

<sup>1</sup> All focus group participant names are pseudonyms.

# nect ..... Work

and older students could and should learn from each other. Peter, a retired airline pilot in his 70s, saw “older people as a huge resource” for colleges. And many focus group members stressed the mentoring roles that older adults could play for younger college students.

Sometimes this learning to connect across generations springs from learning experiences that have another purpose. One focus group member, Sharon, 57, has spent most of her higher education experience in classes with younger students as she works toward her associate degree. Although Sharon went back to school to gain skills for future employment, these inter-generational connections have an

“Now that I’ve passed anatomy and physiology class, I’ve got more confidence. I’m looking at the physician’s assistant and phlebotomist programs, things I never would have looked at before.”

—Focus group member (age 57)

unexpected benefit. As she described, “Just because people are much younger than me doesn’t mean they have nothing to teach me. . . . Somehow between the two generations you can have a very positive experience.”

## Learning to Work

Older adults (and society in general) are at a crossroads with work, learning, and retirement. Many find themselves leaving their lifelong careers that paid the bills only to want a second, more meaningful career that benefits their communities or society as a whole. The June 2008 *Encore Career Survey* (Civic Ventures, 2008) reported that between 5.3 million and 8.4 million adults aged 44 to 70—or approximately 6 to 9.5 percent of this age group—are working in an encore career, the top five of which are education (30 percent), health care (23 percent), government (16 percent), other nonprofit organizations (13 percent), and for-profit businesses that serve a public good (9 percent). However, while this growing interest in meaningful encore careers is promising for resource-strapped communities, many older adults are concerned about their own economic security and *need* to work for financial reasons, especially in the current economic climate.

Results from the Reinvesting in the Third Age survey underscore the important role education plays in older adults’ career goals. Responding institutions reported that, while fine arts and

humanities courses were the most popular among older adults (58 percent of institutions identified fine arts/humanities as one of the top five programs enrolling older adults), work-related courses weren’t far behind: 49 percent of institutions identified business management and entrepreneurship as a “top five” program; 29 percent, human services and counseling; 26 percent, teacher education; and 21 percent, health services.

Comments from focus group participants also reinforce this. Many articulated the motivation to keep learning so they could continue working or return to work (paid work), or contribute to their families and communities (unpaid work). One focus group member who participated in peer-led learning programs, Marge, 55, spoke about caring for aging family members—a responsibility that is shared by many adults in this cohort. Courses about care giving, gerontology, dementia, and Alzheimer’s disease were therefore of interest to her. Another focus group member, Elaine, 81, earned her certification as a nursing assistant, which led her into critical care work for hospices. As she ages, Elaine continues to gain skills—and has earned additional certifications—that open up opportunities for both paid and unpaid work.

For many older adults, personal fulfillment comes from a combination of learning something new, benefiting the community, and bringing home a paycheck. For example, Sonya,





paid and unpaid work, and to serve both the community and learner's interests as well.

### Learning for All Three

Although each of these learning motivators can stand alone, the impetus to learn for older adults is not singular, linear, or even sequential. Focus group members Tim and Deborah exemplify this: At age 56, Tim, a higher education participant, is shifting his work focus from his management career to music. He is also actively involved in community events. This variety of interests indicates that several drivers propel him toward higher education: learning to work (for his management and music careers), learning to learn (for the joy of music), and learning to connect (for his community work). For Deborah, 55, who is not yet enrolled in lifelong learning programs and lives at the lower end of the socioeconomic spectrum, later-life engagement in higher education could afford her opportunities she did not have earlier and help her move up the socioeconomic ladder. Her experience highlights the potential for mobility for previously undereducated adults—and identifies strategies that truly “democratize the new dream for the second half of life” (Freedman, 2007). Helping adults

plan for life transitions—and providing them with financial aid options as needed—are two such ways.

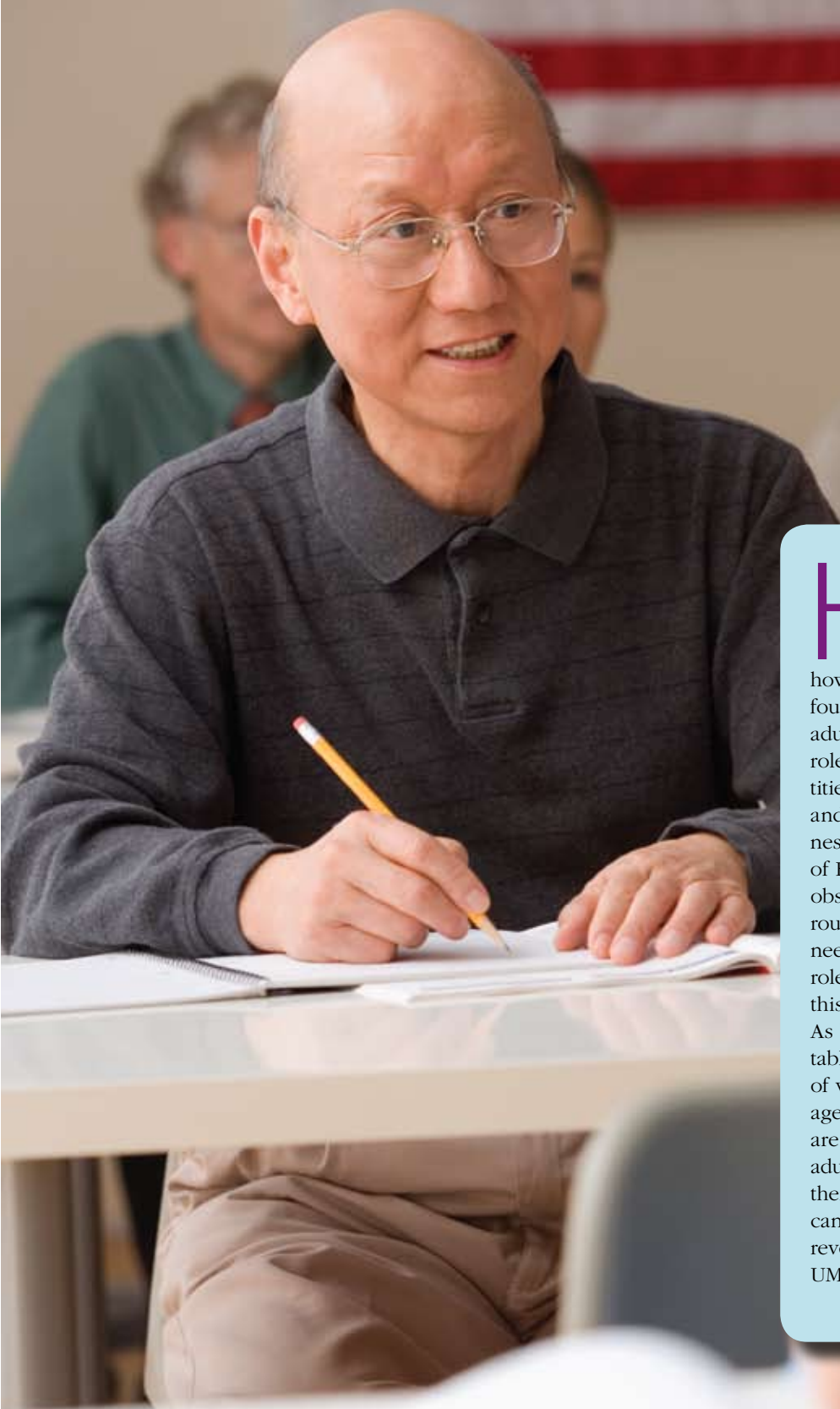
In the past few years, colleges and universities have created more programs to help older adults train for new careers, participate in community service, and learn while in retirement. But many more institutions remain stuck in outdated, one-dimensional views of older adults and learning. “I’ve been scolding my staff that we’re not doing enough,” said roundtable participant Nick Allen, an administrator and provost emeritus at University of Maryland University College. “The attitude has been: ‘These are retirees. We’re not in the Elderhostel business or edutainment business,’” a sentiment Allen and others view as shortchanging the abundant opportunities for both higher education and society to respond to older adults’ motivation to learn.

With a more comprehensive grasp of learning drivers, higher education institutions can shape more meaningful messages and methods for outreach, develop programs and services that meet changing educational and training needs, and structure more creative ways to finance learning. To successfully serve this population, higher education needs to rethink how it identifies this vastly diverse group, which means a better understanding of how older adults identify themselves.

57, is taking an educational path that is both personally fulfilling and offers financial security. She was pursuing her master’s degree when she suffered serious injuries in a car accident that left her with memory problems and other learning disabilities. Despite these, she enrolled in an anatomy and physiology course. “I thought if I can get through [that], I can jump to other things I’m interested in, [like] holistic medicine,” she said. She finished the course and is now enrolled in the massage therapy program, working toward her license. While her career interests might ultimately benefit others, Sonya is primarily motivated by the work itself—demonstrating how learning to work can encompass the desire to gain new skills and refresh old ones, to engage in



## Older Adults and Identity: Charting Multiple Selves



**H**ow *do* older adults identify themselves as community members, workers, and learners? Further, how do community colleges and four-year institutions view older adults in relation to these same roles? Finally, how do these “identities” affect outreach, programs and services, and their effectiveness? Judy Kuipers, president of Fielding Graduate University, observed during the Indianapolis roundtable discussion that “we need to explore . . . the whole role of values and prejudice in this notion of looking at aging.” As both focus group and roundtable participants attested—many of whom belonged to the 55–79 age group—these societal views are often interwoven with older adults’ sense of self, influencing their perspectives about what they can do and learn. “It’s been very revealing for me personally,” said UMUC’s Allen, who has recently

“We’re aging, but we’re not done yet.”

—Focus group member (age 81)

insights, higher education leaders are better equipped to help their institutions shift perspectives and practices concerning options for older adults.

Results from the project’s national survey of higher education institutions call attention to the numerous ways in which older adults are identified—and not identified—by colleges and universities. For example, more than 40 percent of institutions responded that they did not identify older adult students for purposes of outreach, programs and services, or financial aid. Of the 53 percent that did, about 7 percent identified older adults as those aged 50 and older; 13 percent identified them as 55 years and older; and almost one-third cited an age range beginning at 60 or 65. Survey responses and comments indicate that institutions’ primary reasons for identification related to noncredit programming, created specifically for older adults, and to tuition waivers mandated by state statute, institutional policy, or both.

Questions related to identity and programs and services designed for older students elicited answers that ran the gamut. One institution, for example, identified three distinct groups of older adults that it serves: participants in peer-led institutes; adults enrolled in programs to retool for careers; and older women returning to

shifted career gears himself. “I’ve been asked, ‘How are you enjoying retirement’—but I’m not retired. I’ve been operating on my own time, learning, growing.” With similar personal

complete undergraduate degrees, a population that has historically been part of the institution’s mission. Other institutions indicated that they did not identify older adults as a student population, or that they serve few or no older adults. Finally, one college indicated that older adults are the only students that it serves.

This inconsistency in identifying the older adult population underscores the range of older student groups, as well as the range of documentation required by institutions to verify students’ ages. At the same time, lack of awareness about older adults’ participation may be compounded by ageist attitudes, which these students sometimes encounter on college campuses. Such attitudes, these learners report, often hinder delivery of the academic and career planning support they need (Lakin, Mullane, & Robinson, 2007). Further, this bias often accompanies them from the campus to the workplace, as reported in the International Longevity Center’s major study on ageism (Butler, 2008). That study found examples of workplace bias, which included underutilizing the skills of older workers; lack of promotion and training opportunities; greater difficulties for older unemployed people to find work; and higher rates for retirement than there might otherwise be. As one ACE focus group member observed, “If you are studying and of a certain age, unless you’ve already established yourself, it’s impossible to find a job. It would make you wonder, ‘Why am I taking this course?’”

Whether overt or subtle, ageism certainly colors older adults’ self-perceptions, which in turn affect participation in higher education. It further influences how language related to aging

resonates with this population and contributes to the messages colleges and universities employ in trying to reach them.

### What’s in a Name: The Impact of Language

Contemporary language reflects both traditional and changing perceptions about older adults. A common theme throughout the roundtables was the need for a new language that speaks to existing and potential students across generations. Language preference may not only be generational, but “highly local” as well, influenced by factors such as race, national origin, and class (Community Experience Partnership, November 2007). For example, at the Mesa roundtable, Alberto Olivas, director of Voter Outreach at Maricopa Community College’s Center for Public Policy, said that some older Hispanics, such as his mother, did not identify with the term “boomer,” a feeling echoed in other research studies (November 2007).

Interestingly, comments from our focus groups did not reflect this generational divide as much as highlight their common view of aging as a journey. One group member who herself works with older adults, made the point that they no longer call the adults *seniors*, preferring the word *aging* because it conveys a journey, rather than an end. “We’re aging, but we’re not done yet,” she said. Another 57-year-old participant told us, “I like to say now that I’m ageless.” And roundtable participants, who in most cases belonged in the 55- to 79-year-old group, took both a personal and professional interest in the semantics of age. In discussing how her college serves older adults, one higher education leader identified herself as “one of them.” She said: “I’m not done. I’m in that third age.

I still have a lot to contribute.” Another roundtable participant added, “I like being called a ‘third ager’; it implies that there’s a fourth or fifth age.”

In light of these discussions, it wasn’t surprising that all adults who participated in the focus groups—across age cohorts—were resistant to labels that included the terms *senior* or *older*, in large part because they didn’t view themselves as part of that group. “If [outreach material] said it was geared toward older adults, I’d probably ignore it,” said one boomer focus group participant. “I don’t think of myself as older. . . . I’d think it was for other people, not me.” Another 74-year-old participant concurred, “The only time that I admit I’m a senior citizen is when I go to Dunkin’ Donuts® to get a free donut. I don’t believe I’m older than 18 in my heart and mind.”

### Moving on Up: Socioeconomic Mobility

Socioeconomic differences affect perceptions and possibilities as well. Although many older adults are in good health and have enough retirement savings to pursue leisure activities or a lower-paying encore career, this is not the reality for everyone. Blue-collar workers in particular may feel their post-retirement career options are limited. “It’s easy for the white-collar worker to retire and consult,” said Indianapolis roundtable participant Teresa Voors, the commissioner of workforce development for the state of Indiana. “It’s not so easy for the blue-collar worker. They lost jobs where they used to make 40 grand and want to find similar jobs where they can make the same amount. What they need to see very concretely is that if you go back to school and raise your skill set, then here’s



what’s available to you.” How higher education perceives these possibilities for older adults, such as displaced factory workers, impacts how it stands ready to help them achieve their goals.

Other adults who are more educated and financially well-off may choose to pursue a new career that pays less or nothing at all. For those adults, higher education can lead to a type of mobility not tied to economic need or financial benefits, but rather self-fulfillment and social recognition. One study of older adults pursuing higher credentials found that “the drive to preserve or gain self-esteem through a socially recognized and valued formal qualification” strongly motivated many of them. An added credential symbolized “a new beginning or the development of a new social

identity,” which they viewed as vital for their well-being in later years of life (Jamieson, 2007).

However, with the dual realities of increased longevity and growing financial uncertainty, many older adults urgently need educational options to foster *both* social and economic mobility. Charting the multiple ways in which older adults identify themselves—as workers, learners, and contributors to their families and communities—is a necessary step in shaping more effective outreach strategies, as well as appropriate programs and services.





## Crafting New Messages and Means for Outreach

“Four years ago, it was hard to find anyone even talking about older adults and higher education,” said Kay Crawford, senior fellow at the Center for Aging and Community at the University of Indianapolis, at the Indianapolis roundtable. “That’s really changing.” With this change comes the challenge for colleges and universities to identify exactly who these people are. Comments from the regional roundtables confirmed that higher education recognizes the nuances of this population. The consensus was that if one-size-fits-all education doesn’t work for other learners, why should it work for older adults?



“We’re not the same,” stressed focus group participants in their responses to questions about learning motivators, outreach strategies, and appropriate programs and services. Thus, community colleges and other colleges and universities must “resist the tendency to over-generalize” (Mehrota, 2003). Instead, they must ask themselves about the multiple means and messages they could use to reach older adults with disparate needs and interests. This is especially true for efforts to broaden the number of participants beyond those who are highly educated and economically secure.

On the question of outreach, 40 percent of responding institutions indicated they did not specifically target the older adult population. Of those respondents who *did*, over half rated print advertising and their own web sites as their primary means of marketing, and at least one-third also used exhibits and presentations, as well as direct mail and their institutions’ catalogs. Confirming these various approaches, focus group members described the variety of ways in which they receive information, emphasizing the multiple types of outreach necessary to contact this population. Yet their comments also illustrate that the message, language, and format of these efforts may discourage participation.

“We’re not taking fear into consideration,” said Shelley Gimenez, dean of the School of Continuing Education at Eastern Connecticut State University and a participant in the Indianapolis roundtable. “Even if the information about college is there, they’re scared to take that first step. They need some handholding.” Comments from focus group participants supported this, with several noting that even marketing materials can increase, rather

than allay, fears. “Colleges should do something with catalogs to eliminate feelings of intimidation,” said Rose, who has not participated in higher education. “Not having [attended] college, you look at the catalog and it’s confusing. [Colleges and universities should] relate the programs to the community, and make people realize that they can do this, that higher education is not something to be afraid of.” Some older adults believe, for example, that “to go to a community college, you have to have a degree.”

What *does* work? Messages that address practical concerns, such as transportation, safety, and educational support can make a difference in whether older adults enroll in lifelong learning classes. Among other suggestions, focus group members called for outreach that assures prospective students they will have amenities like covered parking and shuttle bus service from senior centers.

One member told us why. Now in her early 80s, Elaine has enjoyed her later years, acquiring a long list of continuing education credentials and serving as an active volunteer. Recently, however, Elaine has relinquished her driver’s license. As she lamented, “Some people need to access [outside] resources every day because they don’t have family members who can help them.”

Beyond practical concerns, outreach messages that speak to learning motivators seem to work well. “Colleges [should] emphasize to seniors that you don’t have to take classes for credit; you can do it for fun and your own improvement,” said a 61-year-old focus group member who works part time. Another woman in her late 50s, who does not participate in higher education and works 70 to 80 hours a week, agreed: “I have a very demanding job, so I don’t see myself as a candidate for coursework. [However,]

I would pursue personal enrichment courses.”

Learning for connection lends itself to still other messages. One focus group member, who also leads a

peer-to-peer learning group, noted that colleges and universities must remember the crucial role that education can play in helping adults connect with others. “They want a peer group that they can relate to and have friends,” he said. “They seek out people of similar ages and backgrounds. They want to enjoy themselves.”

### Creating New Perceptions: Reaching the Hard to Reach

If many older adults who did not previously attend college are less inclined to do so later in life, how does higher education change their perceptions? “It’s a lot easier to pull those back to campus who already have an education,” said Elmira Mangum, senior associate provost of the University of North Carolina, Chapel Hill, at the Indianapolis roundtable. In fact, older adults who already have participated in higher education are more likely to return to college of their own initiative. They hear about lifelong learning opportunities from their peers and through other community and professional networks and take the necessary next steps.

But reaching older adults without that experience can be difficult. Thus, effective outreach messages and methods that target older adults with different backgrounds vary widely. In states like North Carolina, for example,

“We need to demystify the college experience.”

—Alberto Olivas, Director of Voter Outreach, Maricopa Community College’s Center for Public Policy

where more than 35 percent of the 65-plus population does not have a high school diploma (U.S. Census Bureau Fact Finder, 2004), colleges and universities are tasked with reaching large numbers of adults who, because they lack both credentials and experience, don't look to higher education as a lifelong learning resource.

By contrast, the Academy for Lifelong Learning at Cape Cod Community College attracts a primarily white, middle-class population. "But few minorities [here] are middle-class professional retirees," observed Kathleen Schatzberg, the college's president. "That's one of our struggles in the future: attracting low-

income and minority populations."

Similar to



Cape Cod's population, 17 percent of older adults who participate in Rio Salado Community College's programs have an annual retirement income of \$90,000 or higher, and 70 percent hold college degrees. "So, how do we get [less-affluent, less-educated adults] to come to our campuses?" asked Linda Thor, president of Rio Salado.

Additional comments from roundtable participants echoed the challenge of reaching diverse populations. Allen, of the University of Maryland University College, noted that, despite his institution's reputation for being inclusive, only 2.7 percent of graduate students and only 2.1 percent of undergraduates are in the 55- to 79-year-old age range. Part of the challenge is reaching adults who might not be comfortable in a college setting. As Olivas of Maricopa said, "Some people's perceptions of colleges are based on their

first exposure—if any. What was their first experience? Negative? Or no experience at all? Maybe they don't know how to approach an institution. Who do you talk to? Where do you go?"

Age, experience, culture, and socioeconomic level all play a role in how messages are received. One focus group member agreed, "People with different educational levels and different socioeconomic levels are going to look different places. . . . You have to try more than one way to reach them."

### Who Says So: The Power of Messengers

The messenger can make a difference as well. Focus group mem-

bers attested to the power of testimony and the ways in which family and social connections can influence decisions about lifelong learning. All but one of the focus group members said referrals from friends or family would make a difference in their choosing to enroll in a college course. Marge, a focus group member and a retiree in her mid-50s who leads a peer-learning program, stressed the value of recommendations from peers and others, noting that most members of the program joined through word-of-mouth. Anne Arundel Community College staff members concurred, observing that older adults "have their own posse. Often they spread the word about classes, then register and attend classes together."

Yet the importance of these referrals extends beyond a simple endorsement of a class or program. Instead, they were viewed as confidence-building testimonials for a population that might be reluctant to pursue learning in a higher education setting. "My sister-in-law's mother went back to school at 82 years of age. If she can do it, maybe I can do it, too, and maybe my mother can do it," said Deborah. This idea of "modeling" behavior resonated with several participants. "The personal touch is very important," said Tim. "I was the first one in my family to get a bachelor's degree. But after I did it, I could tell my sister about it, and then she did it. If you give your testimony to other people, they're more inclined to take it. If they hear, 'I tried this and I could do it,' then they'll be more likely to try it, too."

Sharon, the focus group member pursuing her associate degree, felt strongly that testimonials from other older students would have significantly helped her confidence in returning to school. She recounted how

nervous she had been when she stepped into the classroom for the first time and her concerns that she wouldn't be able to perform well academically. "If anyone had said to me when I was considering going back to school, 'I did it and it was terrific,' that would have eased a lot of my fears."

### Varied Venues: Integrating Into Community

Outreach strategies that use community venues can also decrease older adults' fears. In fact, focus group members, lifelong learning participants and non-participants alike, continually emphasized the need for higher education to integrate with the community. As noted earlier, transportation can be a fundamental part of this integration. "More and more people are going to senior centers during the day," said Tim. "They might not have the transportation to get to college, but they're a group that is interested in more activity. Colleges and universities need to consider how they would get seniors to the classes or bring the classes to them."

According to survey responses, the main campus is still the primary venue for delivering programs to older students, followed by branch campuses, online classes, senior centers, and nursing homes or assisted-living facilities. Other respondents cited community centers, churches, a campus-affiliated museum, corporate sites, local libraries, and even hotels as venues for delivery. Still another emerging trend is the development of retirement communities associated with colleges and universities, with the potential for intergenerational learning and the promise of new revenue streams (Halligan, December 2004).

Promoting classes through churches, community centers, and senior centers was the recommendation of several focus



## Where Older Adults Learn

Survey responses show that, while institutions offer classes to older adults via other venues, the main campus is still the primary location:

▶ Main campus	95 percent
▶ Branch campuses	46 percent
▶ Online	39 percent
▶ Senior citizen centers	15 percent
▶ Nursing homes or assisted-living facilities	10 percent

(Institutions could choose multiple responses.)

group and roundtable participants alike. Schatzberg of Cape Cod Community College noted that even the age differences among the older adult population affect their relationship to higher education: Boomers are more likely to attend classes on the main campus, while their older counterparts generally choose extension campuses that are easier to access. As a consequence, her college offers two classes at a local senior center and one at a library, and discussions are underway with an area minister about offering courses at a church. Yet even these options present a dilemma: While different venues may attract people who are hesitant to come to campus, off-site delivery can propagate a kind of segregation. Schatzberg said she would like to find a way to bring the cultural and economic diversity of older adults to the campus environment as well.

In response, Olivas of Maricopa Community College suggested a blended style, with some classes convened on campuses and others in community settings, as well as taking a family approach: "Some populations are more inclined to do things as a family. So, we've used existing family-oriented events and community organizations that serve the underserved" to broaden out-

reach strategies. Thus, effective outreach strategies may include an intergenerational approach. "What brings younger people to our institution are the same things that draw other community members, including older adults," said Penny Armstrong, assistant provost for Outreach and Extended Programs at Kentucky State University. "In reaching out to this group, it's important to remember traditions across generations."

This raises a critical question: Because older adult populations are far from homogeneous in their learning motivations and needs, how should higher education institutions—given their own unique missions, funding streams, and programs and services—shape outreach messages and venues? Some roundtable participants suggested that resources should focus on older adults who are already listening. "Yes, we need to worry about those who are really disadvantaged," said Graham Toft, president of GrowthEconomics, a research firm that tracks aging trends. "But we also need to respond to the ones who are moving as fast as they can. Those at the lower end of the workforce learn a lot from their colleagues. If they see their colleagues making it, that's going to be more effective than us telling them."





## Programming for the Next Chapter

With longer lives, older adults' aspirations and needs around work, community, and learning are influenced by shifts in social, political, and economic conditions. Further, while the image of an older adult unhurriedly engaged in a leisure activity may remain fixed in our minds, different realities co-exist. Many older adults are actually in a hurry to learn—whether it's their first chance to study a particular subject, train to participate in civic activities, or become credentialed for a new career focus.

But many others aren't sure where or how to start. Those in their 50s considering 30 to 40 more years of life often experience a feeling of urgency about how to make this next life phase work for them financially, socially, and psychologically. Lifelong learning at the right time and in the right amount of time can foster critical forms of mobility—not just upward, but across workplaces, communities, and generations. This latter kind of mobility has a strong appeal for older adults, and they often need it right away to progress successfully at this time in their lives.



Community colleges, in particular, are trying to attract the “encore student,” as evidenced by new initiatives, such as Civic Ventures’ Encore Colleges for adults aged 50-plus. In ACE’s institutional survey, higher education institutions across all sectors reported a range of mostly noncredit programs geared toward older adults, from peer learning programs, wellness courses, and spirituality institutes to tutorial services, skills assessment for career change, and volunteer training for intergenerational service programs. Some survey respondents also commented that older adult students enrolled at their campuses have access to the same programs available to the general student population. And while many responding institutions identified a range of programs available to this age group—such as computer training (67 percent), career transition counseling (48 percent), ESL instruction (39 percent), and GED preparation/basic skills training (36 percent)—more than 40 percent of respondents also estimated that less than 10 percent of their older adult student population takes advantage of such services. This gap in usage suggests that institutions must look not only at outreach strategies, but also how to adapt existing programs and services to better address the learning needs, drivers, and transitional stages of this population.

### Devising Formats for Greater Mobility

How could institutions acknowledge, in concrete ways, the importance of mobility for older adults? As an example, some community colleges and four-year colleges and universities have recognized the value of older adults’ time through accelerated and alternative

credentialing, which take into account both past experience and nontraditional learning formats.

“Older adults don’t have the time to devote to a long educational experience,” advised Melanie Starns, director of Arizona’s Office of Aging. “Push the educational model. Think in terms of six months,” not two years.

Focus group members confirmed this. “I got my bachelor’s degree in 22 months [at the age of 43] because of [credit for] a life-long learning component,” said Tim. “I think colleges and universities need to build on that model of learning. Older adults bring something to the table. If that life experience is valued, both for credit and in the classroom, it’s going to make a difference.” That certainly seems true for Andrea, 59, currently working full time. She said, “I would not be interested in additional education because I don’t want to do the homework and make a long-term commitment.” Later in the conversation, however, she added that an accelerated program might be something she could start before retiring from her current job. “If I had these accelerated programs and prior learning assessment, I would take the tests and do the homework.” At the Mesa Roundtable, Connie Boehler, emeritus department chair at Coastline Community College, stressed that the need to accelerate delivery of education programs often stems from this population’s life circumstances, such as divorce or a death in the family. “We can’t expect them to stay around for the entire school year. We need to be able to help them learn how to support themselves quickly.”

Prior learning assessment is one way of doing that. Not only does it compress time to degree, but it lowers educational costs, as well, noted Roger Sublett, president of Union Institute and



## Jumping Ahead

When institutions were asked how they assess prior learning of older adults, nearly half (48 percent) said it was done through exams; 36 percent cited portfolio review; and roughly 34 percent indicated use of ACE credit recommendations for workplace and military training. But 37 percent did not conduct prior learning assessment at all.

(Institutions could select multiple responses.)

University and a participant of the Indianapolis roundtable. While almost half of the survey respondents identified at least one method of prior learning assessment at their institutions, more than one-third did not conduct any type of prior learning assessment. In addition, institutions reported that 44 percent of their older adult students did not participate in prior learning assessment methods. While this may indicate that older adult students at these institutions are participating in higher education because of their drive to learn, rather than to advance or change careers, their questions about prior learning assessment suggest that higher education institutions could also more effectively target outreach messages about prior learning assessment to older adults, as well as adapt and expand existing assessment methods. In fact, the growing trend of “encore careers” may propel a greater demand from older adults for assessment of their skills and knowledge.

For older adults who have been displaced from jobs and must quickly move to new ones, waiting for a new semester to start or committing to a three-month course is not an option.

“Don’t put us off somewhere and say, ‘That’s all you can learn.’”

—Focus group member (age 79)

areas where we know we have a need,” said Allen of the University of Maryland University College. In addition to accelerated programming, prior learning assessment, and flexible start dates, Allen recommended that linkages be created between higher education and industry to develop a network that “lets these workers know they have a choice.”

### Bit by Bit: New Skills, New Ways to Get Them

Part of the solution is rethinking how education is delivered so it gives older adults the education they need when they need it—or, as one roundtable participant put it, delivering education *skill-ettes*. “Let people pick and choose what they need,” said Bernie Ronan, executive director of Maricopa Community College’s Center for Public Policy. “It’s going to be people coming in, grabbing the learning they need, and going out into the world.” He added that a potential benefit of this paradigm is that older adults might “fall into” a more formal program after successfully completing condensed courses.

It is this type of thinking that requires colleges and universities to approach lifelong learning with the mindset of delivering job replacement programs, said

“We should offer educational programs for older adults who are coming out of blue-collar professions, who won’t have the money to retire, who must convert skills that they have so they can be employed in

Charles Middleton, president of Roosevelt University. “Tell older adults, ‘Because you know this, all you need is to take one or two other courses to be able to do this other job. You could have this other career with only a little bit of additional work.’ It creates new opportunity,” he said.

Apprenticeships were also suggested as an alternative way to deliver education. “Can’t we create something that would be income-generating and skill-building but also provide companies [with skilled] workers?” posed Judith Ramaley of Winona State University. “Youth apprenticeship programs could be completely rethought. . . . We must look for programs that already exist on campus and are embedded within industry and the community. We need to provide transition without increasing indebtedness.”

The nonprofit sector is one industry facing real workforce shortages. “You have a lot of retirees who can say, ‘I’m perfectly capable of running something—but not *this* something,’” said Ramaley. “Again, it requires an apprenticeship-like shadowing” to get them up to speed.

Beverly Pitts, president of the University of Indianapolis, spoke of a secretary, retiring after a lifelong career, who wanted to pursue event planning as her next career. “We didn’t have a system to help her,” she said. Eventually, they found a seasoned event planner who gave the secretary a kind of apprenticeship. Through this experience, Pitts realized that the university “could try to be that link to other services that might help students.”

With these learning networks—apprenticeships, paid internships, and alternative routes

for credentialing, for example—an older adult can take who she is and what she has done and put it to use in another work or learning environment. That, in turn, makes higher education more possible—and more appealing.

### Moving Across Generations

The preceding formats recognize skills and knowledge that older adults have already acquired. At the same time, flexible and varied learning environments—peer-to-peer, intergenerational, online, and face-to-face—enhance the learner’s mobility and self-sufficiency across learning, work, and community spheres. For many focus group and roundtable participants, intergenerational learning enriches the learning experience, yet it also presents challenges for administrators, instructors, and learners themselves. “This is raising a lot of questions,” said Hope Williams, president of North Carolina



Independent Colleges and Universities. “If you get the non-traditional student numbers too big, traditional students feel uncomfortable. [There are] conflicts [and] tensions with intergenerational programming.” Not surprisingly, we may see more of these tensions as learners age. Further, with a lack of intentional planning for interaction across generations, faculty, service staff, and students are often unprepared for challenges that can arise.

For their part, older adults’ anxiety about intergenerational classes and activities often stems from the fear of being unable to keep pace or contribute at the same level as younger students. “Sometimes seniors are worried about saying something stupid, or not knowing as much as the younger students,” said 61-year-old focus group member, Esther. But experience can alter perceptions. Sharon, didn’t expect to enjoy the intergenerational experience, but realized its benefits.

“I was concerned about being the oldest student around 18- and 19-year-olds,” she said. “But the younger ones can be very stimulating.”

Still, older adults can find other aspects of the classroom experience overwhelming.

Another focus group member, Rick, 74, took an electrical class so he could learn about home wiring because he kept shocking himself while doing home improvement projects. But the class began with taking apart computers and drawing the schematics. “I tried to keep



## Learning Online: Mixed Reviews

When asked about distance education, the majority of focus group members said they would *not* enroll in an online course—either because their computer skills were not strong enough, because of the loss of face-to-face connection, or both. “My computer skills are higher than some seniors, but I’m still not as proficient as younger people,” was a typical comment. “As I’m getting older, I’m not as quick in my responses and I make more errors. And I’d rather not stare at a screen.”

Simultaneously, however, the increasing technological sophistication of older adults is also pushing higher education to rethink its course offerings for this population. Cape Cod Community College, for example, has seen a rise in demand for advanced computer classes. “For 12 years, we taught computers for seniors, with the original concept [being] to teach

seniors how to use e-mail,” said President Kathleen Schatzberg. “We’ve saturated that market. And now with social networking sites . . . we’re thinking about offering a social networking course.”

The college’s experience is supported by a 2007 Eduventures report (Guess, November 28, 2007), which reported that the fastest growing online audience is adults over the age of 50. In addition, the demand for online learning rose by 21 percent among the 55- to 64-year-old age group in 2007, and by nearly 10 percent among those 65 and older. At the same time, a recently published report, again from Eduventures, shows that while the 35–44 and 45–54 age groups prefer online options, those adults aged 55 and older overwhelmingly prefer campus-based study (Eduventures, 2008).

up with the kids but I couldn’t. I felt overwhelmed, so I dropped the class. I wish I’d stuck with it.” He did, however, emerge from the experience with a deep appreciation for the intergenerational experience. “Most [of the students] really wanted to help; they didn’t want me to make a mistake. . . . There was a really good rapport there. To segregate [by age], I think that’s wrong. Integration is very valuable.”

Listening to these experienced voices can benefit colleges

and universities in several ways, because older adults mirror both the shifting demography *and* personal expectations. Programs and services must reflect this evolving transformation, from intergenerational learning to job training and technology competencies. Two decades ago, Boston University’s Metropolitan College began an intergenerational program called Evergreen to “support a population that was not well-educated and was living on a fixed income,” said Jay Halfond, dean of the





college. “But it’s increasingly a very well-educated cohort. Expectations have changed and the values they bring to classes have changed. They don’t want the ‘educational nursing home’ that’s separate from the rest of the university. . . . We must recognize the increased sophistication of those in this age group.”

### Enhancing Mobility: Physical Environments and Transportation

Because face-to-face education is the choice of many older adults for myriad reasons, colleges and universities can’t ignore the importance of comfort and ease of both environment and transportation when developing programs and services. “When college was built, it was built thinking of young people,” said Tim. “Now that older people want to return to school, [colleges] have to think of building things for them: Is there covered parking? Is it lighted? I’ve found as I get older, I want to feel safe.” Esther,

who is active in a peer-learning program, agreed. “Seniors want a comfort zone. Where is the class? Where is the parking lot? Is it all on one floor or will I have to take stairs?” With artificial knees, she wants a class that’s easy to access.

As Esther’s comment illustrates, physical disabilities have the potential to derail many older adults’ lifelong learning aspirations. On the other hand, managing to persist in spite of disabilities can be a powerful motivator to learn, especially at a mature stage of life. Focus group participant Sharon, for example, was concerned that her hearing loss would make it difficult for her to hear the instructor. Fortunately, hearing aids (paid for through a state program) made a difference, as did the college’s accommodations: “Instructors were happy to have me sit at the front of the class, and the college has services to make sure you have accommodations.” As a result, Sharon said she felt like

“a whole new world opened up. Before that, I felt like I was never going to find a place for myself.”

But not all older adults find colleges and universities so adaptable. Sonya, who also has disabilities and is pursuing a degree, equated returning to college to “moving into your teenager’s room.” She said, “Facilities are not set up with older adults in mind. Campuses need to be planned so they are multigenerational. Make it a room for everyone.”

Transportation, or lack of it, can also keep older adults away from lifelong learning experiences, particularly minorities and individuals with low incomes. According to a 2006 AARP survey, 25 percent of African Americans aged 50 and older missed activities due to transportation difficulties, compared with 9 percent of whites in the same age group. At the same time, almost one-quarter of older adults with incomes under \$25,000 missed activities, as opposed to only 5 percent of those with higher incomes (AARP, 2007).

The nationwide institutional survey sheds some light on this as well. While 79 percent of the survey respondents reported that their campuses were accessible by public transportation, they were not asked to rate the reliability or affordability of these transportation systems. Further, the perceptions of older adults about access, cost, comfort, and safety must be taken into account. In addition, the quality of public transportation varies across communities. Participants at the Mesa roundtable emphasized the difficulties of finding workable solutions in their sprawling community. “Transportation’s not an easy discussion, especially in the suburbs and exurbs,” cautioned Arizona’s Starns. “Our best hope is [to partner] with area agencies on aging. We tell them, ‘If you can get [adults] to our campus, we can

“Simply put, how do you make the case for educating older adults when so many competing needs exist?”

—Bernie Ronan,  
Executive Director, Center  
for Public Policy, Maricopa  
Community College

have to be strong partnerships with local transportation providers so older adult students know it's there for them to use. But you've also got to offer a menu of options.”

### Closing the Sale: Making the Pitch for Older Adults

The demand for different kinds of mobility for older adults—outward, across, and upward—may underscore the need for more flexible programs and services. But creating new programs or modifying existing ones can be expensive. In a climate of limited resources, Anne Arundel Community College President Martha Smith argued that for older adult programs to get off the ground, state and federal governments must offer financial incentives for colleges and universities. She noted that community colleges receive federal grants for

move them around the campus.” In Cape Cod County, transportation is also problematic. “In our Academy for Lifelong Learning, we've had some success in encouraging carpooling,” said Schatzberg, of Cape Cod Community College. “Right now, there's no money for a shuttle.” Added Olivas of Maricopa, “There

teaching students in high-need areas; a similar program could be established to reward colleges and universities for serving older adults.

Although progress has been made over the years to create programs and services that accommodate nontraditional students, it is a steep climb to the top. “There's a saying that it's easier to change the course of history than to change a history course,” laughed Martha Nesbitt, president of Gainesville State College in Georgia. “Part of what we're struggling with is the challenge of changing ingrained structures.” Ronan, of Maricopa Community College, summed up the challenge in another way: “Where do you put these initiatives in your institution—strategically? And how do you push these initiatives when your institutional or state goal is to increase the percentage of bachelor's degrees?” Simply put, how do you make the case for educating older adults when so many competing needs exist?

And yet the programmatic needs of older adults may frequently be in sync with those of other “new majority” students, those from ages 20 to 80, with

work, family, and community responsibilities. Because “student” is only one of the many roles they play, traditional methods for acquiring a degree—namely four years of full-time study—are unrealistic for most higher education participants, and particularly for older students. For these adults especially, a degree is unlikely to be the end goal at all. “We have to think about the much broader picture,” said Kathleen Moore, associate vice president at University of South Florida. “Here's a whole group of people who don't want a degree. They don't want to or can't come in for four years. That's a big issue [for an institution] because we aren't set up to do things other than degree programs. We don't even have a language to talk about this.”

### Mission Matters: Making Learning for Older Adults More Than an Add-On

Some postsecondary institutions have become more adept at offering opportunities to gain *skill-ettes*. And some higher education sectors indeed are better “set up to do things other than degree programs,” as Moore stated above. Yet creating appropriate



### Plus 50 Initiative: Lifelong Learning Programs Tailored to Meet Needs of Older Adults and Communities

Through a three-year grant funded by Atlantic Philanthropies and sponsored by the Association of American Community Colleges (AACC), 15 community colleges across the nation—five acting as mentors and 10 as demonstration colleges—will advance programs and services in their communities for adults aged 50 and older. These colleges will promote programs that offer options for older adults to learn for learning's sake, complete training or re-training for new careers, or gain additional skills for community service.

“We can be leaders and facilitators in our communities. Bring in churches, businesses, social services agencies, schools—so we can all understand the challenges we are facing and look at the best ways to serve our communities.”

—Martha Nesbitt, President,  
Gainesville State College

programs and services is but one challenge faced by colleges and universities. The bigger obstacle is integrating learning for older adults when it is not congruent with their missions. “Some colleges are purely traditional liberal arts institutions,” noted Williams, of North Carolina Independent Colleges and Universities. “It’s not part of their mission to serve nontraditional students. We have to keep that in mind. What is the institutional mission?”

Roundtable participants largely agreed that institutional missions are often a barrier to providing access to nontraditional populations. “If we keep insisting on a silo mentality and put not only students but ourselves in a box, we’re going to lose,” said Moore. “We need a seamless set of choices so we have a continuum and can refer people along that continuum.” At the same time, it is possible for “niche” colleges and universities to relieve overburdened institutions by sharing the responsibility. “It may be that there are different roles for different institutions,” said Boston University’s Halfond. “Maybe independent colleges have a more significant role—or offer their own attractions that are unique.”

Currently, community colleges are positioned to serve older adults more effectively, both because of cost and their historical mission of open access. “Community colleges were created over 100 years ago with the purpose of creating access to higher education for everybody,” Anne Arundel Community College’s Smith observed.

With increased longevity and changing national needs and expectations, even institutions without older adults as an intentional part of their mission may eventually have to move in that direction. “There’s a gravitational pull toward higher education,

especially for those adults who have that background,” said Halfond. “There are people who move back to their college towns. They want to be related to the cultural life of the institution. Over time, those schools will realize that they’re serving those generations, even if it’s not part of their mission. It might be by accident.” This accidental “mission creep” can result in missing older adults who are undereducated and don’t seek higher education on their own. It can also mean missing the opportunities that this new wave of learners presents, namely, to rethink higher education and create a learning movement that truly engages people across their lifespans.

### Strength in Numbers: Identifying New Partners

Whatever the possibilities, higher education likely won’t realize them alone. Any effective rethinking of higher education delivery will require buy-in—and practical support—not only from within the institution, but from outside as well. To that end, Nesbitt emphasized at the Indianapolis roundtable, “We can be leaders and facilitators in our communities. Bring in churches, businesses, social services agencies, schools—so we can all understand the challenges we are facing and look at the best ways to serve our communities.”

That’s what’s happening in Minnesota, where the Minnesota State Colleges and Universities System has established centers of excellence in various industry quadrants. “An alliance of industry partners, universities, and community colleges created modular programs to get people into the workplace,” said Ramaley of Winona State. But the key to its success has been the active participation of all the partners. “The habit in higher education



is to go out and hear the problems, go back, and create a solution on our own. It doesn't work that way. This model is so successful because it's collaborative solution-finding."

Kuipers, president of Fielding Graduate University, attributed the success of a program at University of Wisconsin–Lacrosse, where she was chancellor, to a similar collaboration. In response to a high number of patient deaths at two respected health-care facilities, the institution partnered with other colleges and industries to create the Lacrosse Allied Health Consortium for a more holistic approach to the training of health-care professionals. "Over a two-year period, we created a seamless curriculum in the allied health disciplines," she recalled. The consortium even secured state funding to build a state-of-the-art facility that is owned by each of the partners. "The reason that this collaboration worked is that we were a social group, we worked through language differences, we had a common conceptualization, and we took immediate action that [had] outcomes that we [built] on to continue the collaboration."

Similarly, in Indiana, the Workforce Development office has engaged Ivy Technical College to help displaced workers retrain for new jobs. "We can say to [the worker], 'You've been doing X job, but with X+1 job, you'll do *this* kind of work and earn this amount of money—and this is what it takes in terms of training,'" said Voors, the state's commissioner of workforce development. Ivy Tech then provides customized training so workers needn't wait until the beginning of the semester to enroll, and can bypass other barriers as well. UMUC's Allen also would like to see more four-year institutions engaged in similar partnerships for retraining older

workers. "A significant portion of the third-agers will need to come back for retooling for employment on a new track—blue-collar workers who physically cannot continue in their professions, or folks who were forced to retire and can no longer afford retirement," said Allen. "It's their needs that my institution and some of the traditional universities need to address."

A further benefit of partnerships is that they capitalize on each player's strengths. Citing another example, Nesbitt described the success of Communiversity in Georgia. Founded by a community member (in his own encore career), the initiative brings together the niche degrees of different institutions: a nursing program from a private college, a manufacturing component from a technical college, and an interactive program in which young people can simulate professional careers. Nesbitt noted that a similar model would be "ideal for fostering older workers," because it would allow them to acquire the *skill-ettes* they need to advance to their next career, pursue a hobby, or enhance their volunteering.

"A significant portion of the third-agers will need to come back for retooling for employment on a new track—blue-collar workers who physically cannot continue in their professions, or folks who were forced to retire and can no longer afford retirement. It's their needs that my institution and some of the traditional universities need to address."

—Nick Allen, Provost Emeritus,  
University of Maryland University  
College



## Finding the Money: Restructuring Financing

The search for adequate funding is a perpetual challenge in higher education, no matter the student's age. Budget cuts and a sagging economy are straining systems of learning from pre-school on up. Further, colleges and universities must balance older adults' needs with those of younger students, who are often their state's legislative priority. Armstrong of Kentucky State University spoke about the 12 percent budget cut her college was facing. "On top of that, we have a mandate to double the number of bachelor's degrees in the state—an initiative that will be hurt by budget cuts." All of this makes asking for *more* money problematic at best. Toft of GrowthEconomics summed it up, "How can you make the budget case for third age learning with the 'first' and 'second age' budget cuts on the horizon?"

“When it comes to education, a lot comes up in people’s lives and they can’t afford it.”

—Focus group member (age 57)

adults generally earn more), and fewer drains on the health-care system (research indicates that educated adults are healthier). That older adults represent such a large, influential population (and voting bloc) is itself a compelling reason to educate this group. As Ronan of Maricopa Community College reminded roundtable

Thus, funding requests must be tied to other policy issues that serve the state. Roundtable participants agreed that legislators and, by extension, taxpayers need to know that any funds spent educating older adults will yield real payoffs by way of increased services (with older adults filling positions in high-need areas), a larger tax base (educated older

participants, the ability of this population to “leverage political change” is significant. Witness the force of AARP.

Another way to position funding requests with lawmakers is to propose “a financing mechanism that is more self-sustaining than it is demanding of grants and other funding,” recommended Toft. Lifelong Learning Accounts (LiLAs) are one option. These accounts combine the resources of individuals, employers, and government to offset the cost of higher education and may be “a more predictable funding commitment for state governments,” said Moore of the University of South Florida.

Not surprisingly, expense is consistently cited as a barrier in older adults’ pursuit of higher education. In the focus groups, for example, even adults actively enrolled in lifelong learning programs reported that finding money from one semester to the next was a continuous struggle. “When it comes to education, a lot comes up in people’s lives and they can’t afford it,” said one participant.

Many of these adults were aware that funding sources

existed, but the amount of work required to find and apply for awards seemed prohibitive to them. “There are a lot of grant programs for different individuals if people want to go into specific degrees,” said a focus group member. “I’ve found most of that when I do research at the library. But you have to take initiative to find it.” And these funding streams rarely cover part-time enrollments or courses for personal enrichment.

An indicator of how difficult it can be for older adults to access funding is demonstrated in tuition waiver participation rates. In the institutional survey, nearly 60 percent of respondents offered tuition waivers for older adults. Yet at the majority of schools, fewer than 50 students took advantage of the waivers, as of 2006. Many students may simply not be aware of tuition waivers. Compounding the problem: Perhaps fearing revenue losses from paying students, one-third of the institutions surveyed didn’t advertise the waiver program and 41 percent didn’t target older adults in their marketing. Or these older adults may not meet the age requirement because they



## LiLAs for Learners

Developed by the Council for Adult and Experiential Learning (CAEL), Lifelong Learning Accounts (LiLAs) are a new way for employers and employees to co-finance education and skill development for adults. In a LiLA program, employers match employee contributions to an employee-owned account for education and training. Since 2001, LiLAs have been successfully

piloted in several locations, including San Francisco, northeast Indiana, Chicago, and Maine. Currently, federal legislation for LiLAs has been introduced in the U.S. House and Senate. Although not targeted specifically toward older adults, LiLAs could be one way to help offset higher education costs for this population.



are not at least 65 years of age, for example.

As noted in *Framing New Terrain*, tuition waivers often come with many other conditions as well. For more than half of the survey respondents, space availability was the main condition limiting the use of waivers. Other conditions included audit-only status (20 percent); permission of instructor (9 percent); income cap (8 percent); and noncredit courses only (3 percent). Institutions also added comments about exclusions—for example, application fees, labs and studio courses, and student fees, as well as a limit on credit hours per term. In addition, older adults had to show proof of state residency, have a high school diploma or GED® credential, and provide retirement documentation—all of which can be needlessly cumbersome. At some institutions, tuition waivers were restricted to credit courses; at others, to noncredit courses.

At the same time, a few institutions provided financial assistance in addition to tuition waivers, through scholarships, waiver of student fees, book vouchers, and transportation vouchers. This kind of financial support, critical to broadening access for older adults, was funded mainly by institutions

through endowments, foundation donations, students' fees, private donors, and memorial scholarships established by community members. "As one example of tapping into the ability to pay higher tuition to potentially benefit others," noted Halfond at the Mesa roundtable, "Boston University created a sponsorship program to give older students the option of paying more to support the college's leisure programs." The more an individual donates, the higher on the sponsorship "scale" they rise, thus containing costs and broadening access for older adults on fixed and low incomes.

Further, educating older adults who can afford it generates revenue for colleges and universities. Many roundtable participants observed that increased interest—both within and outside the higher education community—is an indication that this market has the potential to be profitable. The challenge for colleges and universities thus becomes how to find ways to tap that potential quickly. "This market is not going to be around forever," said Ronan, "and it's not our birthright. If we don't find a way to do it, [other organizations] will."

### Something Borrowed: Adapting What's Already in Place

Roundtable participants also referenced existing programs that colleges and universities could adapt to offset the financial burden of educating older adults—including state lottery-funded scholarships. While several states offer a free public college education to successful high school students using lottery funds, their criteria often rule out adult or part-time students. A more accessible variation of this is the HOPE Grant in Georgia. Unlike the HOPE Scholarship, which is reserved for students enrolling in degree programs, the HOPE Grant uses lottery profits to pay tuition for students who enroll in technical certificate or diploma programs. "They do not have to be [transitioning] right out of high school and they can get certification in a variety of areas," explained Gainesville State's Nesbitt. Such a model could be adapted. "For states with both older adults and workforce shortages, they can allow those older adults to go to school tuition-free if they agree to stay in the state for two years."

The Project Graduate initiative in Kentucky is another potential model. Charged with the task of substantially increasing the



## How Older Adults Finance Education

A majority of survey respondents reported their institutions use tuition waivers to finance older adult education. Besides tuition waivers, scholarships were the most common type (53 percent) used by older adult students, followed by "other" (40 percent) and fee waivers (31 percent). Institutional funds were the primary source of funding for aid programs (55 percent).

Other sources (39 percent) and funds from the federal and state government (25 percent and 27 percent, respectively) were also common. About 20 percent of institutions reported employer support as a source of funding.

(Institutions could choose multiple responses.)



number of bachelor degree holders in the state, Project Graduate offers incentives to entice those who are a few credits shy of a degree back to college. These include application fee waivers and the option of paying tuition in monthly installments. Also successful is the *'Breds* program (derived from “thoroughbreds,” Kentucky’s mascot), which collects donations to a scholarship fund for people facing hardships. “These could be adapted to other populations, such as older adults,” said Kentucky State’s Armstrong.

Tuition assistance also can be adapted to help fund older adults. “It’s quite remarkable how willing corporations are to pay for education,” said Boston University’s Halfond. “But built into the expectation for adult life-long learners is that someone else is going to pay for it. How do we take this remarkable generosity and extend it to other populations they never thought

of supporting—like older workers, or maybe former employees?” He suggested a benefit in which employees are entitled to a certain amount of tuition assistance after so many years of service, even if they work only part time. “We need to find out how to leverage that and make it worthwhile, even for those who aren’t the company’s target-age recruits, and encourage potential retirees to stay on,” Halfond continued. “This recasts financing of education for older adults in a company’s self-interest.”

Building on existing programs is beneficial because the infrastructure needed to administer them is usually in place. In addition, they are a known quantity; pitfalls and challenges have already been exposed. Not only does this make them easier to establish, but, with demonstrated success, they’re easier to pitch to college administrators and state officials. As we have seen,

“We need to find out how to leverage that [tuition assistance] and make it worthwhile, even for those who aren’t the company’s target-age recruits, and encourage potential retirees to stay on. This recasts financing of education for older adults in a company’s self-interest.”

—Jay Halfond, Dean, Metropolitan College, Boston University

numerous examples of successful outreach, programs and services, and creative options for financial assistance do exist, even in times of economic downturn.

## Learning for Older Adults: All of the Above

With a rise in the rate of longevity and good health, accompanied by an increased emphasis on productive aging to lessen the burdens of an aging population, more older adults like to see themselves as “ageless.” And they challenge programs inside and outside higher education to keep up with their changing sense of who they are and what they can do. As they cast off the language and perceived limits of age, however, will they also discard programs currently targeted to them?

Understandably, many emerging solutions to bring older adults into higher education focus on learning that meets the larger community needs—to fill the gaps in workforce shortages or, increasingly, to solve social problems through civic participation—and to help colleges and universities increase



their own revenues. Growing evidence exists, in reports such as Civic Ventures' Encore Career Survey (2008), of an increased need for education that helps mature professionals transition to new careers, whether by choice or necessity.

Yet, as *Mapping New Directions* indicates, many older adults still do not seek out higher education for a variety of reasons—including self-perception, fear, physical disabilities, and financial needs, among others. Further, while more older adults may flock to new programs, many may not be looking for a new career or to engage in community service.

The heterogeneous and rapidly changing nature of this age cohort also serves as a reminder for higher education to not inadvertently close doors on those

who lack education in its enthusiasm to offer programs to those who do. A range of opportunities—from the traditional “learning to learn” to the newer forms of learning to connect and work, and from GED credential to PhD—must be made available to those who want and need them. The higher education community must also keep in mind that the market-driven nature of many emerging programs and services that focus on age cohorts, affinity groups, and socioeconomic status may unwittingly propagate age and economic segregation and further isolate those older adults with lower levels of education and fewer resources for participation (Manheimer, 2005). Rather than increase the roadblocks, higher education must work to chart new maps for greater participation across all older adult groups.



## Looking for an Encore

- Between 5.3 million and 8.4 million adults aged 44 to 70—or approximately 6 to 9.5 percent of this age group—are working in an encore career.
- 56 percent are women; 60 percent are between the ages of 51 and 62.
- While the majority have transitioned to encore careers from professional and white-collar jobs, 18 percent previously worked in blue-collar jobs. Three in 10 never graduated from college.
- Three in 10 workers in encore careers live in small towns and rural areas.
- Currently, the top five encore careers are education (30 percent), health care (23 percent), government (16 percent), other nonprofit organizations (13 percent), and for-profit businesses that serve a public good (9 percent).

Source: *Americans Seek Meaningful Work in the Second Half of Life*, A MetLife Foundation/Civic Ventures Encore Career Survey, June 2008.



## What Higher Education Can Do

Every community, regardless of size or geography, is impacted by aging trends. Third-ager growth in new metro/suburban areas in the Southwest and South, rural communities in the Midwest, and older cities in the Northeast points to this, as does the increase of “aging in place” in many suburbs and the search among younger boomers for communities “not just with cultural amenities, but also with good economic climates and prospects for employment” (Toft, April 2008). Consequently, communities in every region of the United States are beginning to grasp the positive effects of lifelong learning on the well-being of all residents, including older adults.

“We all frame this totally differently because of our actual experiences,” observed Ramaley, president of Winona State University in Minnesota. “It isn’t really about [higher education] anymore, but the regions we serve. How do we

become a microcosm of our communities? We need to put it in the context of what this means for regional development and creating a good quality of life for all generations.” Ramaley agreed that the focus on encore careers is important, but added, “We need to look at the *whole social fabric* of large magnet areas with jobs, shopping, and these small communities where people want to live.”

But more communities—particularly rural areas—need older adults to fill workforce shortages and, at the same time, to help sustain the region’s social fabric. The exodus of young people from small towns as they head to college or cities in search of work has left many non-metro areas concerned about how they will hold on to or attract businesses. In rural Indiana, for example, projections estimate a 9 percent decline in the under-55 age group by 2020 (Toft, personal communication, 2008). These communities, along with their higher education institutions, would do well to recognize and foster the talents of older adults—not only to address workforce needs, but also to effectively weave them into the social fabric.

### Take a Local Approach

Roundtable and focus group discussions highlighted the many local approaches now emerging in response to national demographics and issues on aging. Gainesville, Georgia, for example, is the fourth fastest growing metro area in the country and has been ranked one of the 10 best places to retire. “As a result, we do a lot of leisure courses, but we have not explored encore careers,” said Nesbitt, president of Gainesville State. “We’re a great location to develop a strong program.”

To develop the right programs at the right time, institutions

must think locally. “It’s important to look at big statistics, but you also have to really look at your region,” noted Nesbitt. “I’m encouraged to get regional data and then go to our economic development council and say, ‘Here’s what’s happening in our community’ and put together a task force that really listens.”

### Do the Research

San Diego County’s Aging and Independence Services (AIS) offers one model to higher education institutions and the communities they serve on how to conduct research and translate findings into local action plans to help older adults. As one of the six regions that participated in the Aging in Place Initiative (sponsored by Partners for Livable Communities and the National Association of Area Agencies on Aging), San Diego identified lifelong learning as a primary ingredient for aging well. Engaging community partners, including higher education institutions, the county convened a summit and organized four ongoing working groups to identify “what the community is doing right and what could be improved to enhance lifelong learning for older adults” (Partners for Livable Communities and National Association of Area Agencies on Aging, June 2008). Examining a range of issues—from training for paid and unpaid work, to building greater access to information and technology—San Diego’s lifelong learning initiative continues to call attention to higher education’s central role in sustaining healthy communities.

Further, the findings from this project point to the need for colleges and universities to do their own research. To begin, institutions might employ questions posed in the ACE institutional survey (see Appendix 1B)

to gain a more complete view of programs (both credit and non-credit) and services that older adults currently use, or could use. They should also poll their older adult populations to learn more about life-long learning drivers and obstacles. Such initial mapping can offer insights and strategies to address the needs and expectations of older adults in a more integrated fashion.

In addition, institutions can bring together higher education sectors and other organizations within their community to identify best practices and determine gaps in programs and services. To add to their knowledge base about drivers and barriers, postsecondary institutions could partner with community organizations to survey older adults who are not participating in their lifelong learning programs. By facilitating these discussions and considering possibilities for collaboration within and beyond the higher education community, institutions can find their own service niches, establish new markets, make wiser use of their resources, and increase their capacity to serve underrepresented groups of older adults.

“The issue of older adults in higher education may be national in scope, but it is highly localized in many ways, especially in terms of practice.”

—Charles Middleton,  
President, Roosevelt  
University



### Work from a Lifespan Perspective

And there are other benefits. Blending a global view of older learner needs with a local approach, colleges and universities can offer life-planning tools for all their students. Higher education institutions are uniquely positioned—as education and training providers, researchers, employers, and engines for economic development—to take a leading role in educating the population about aging and managing life transitions. By adapting existing formats, such as those for internships, prior learning assessment, and career management,

and creating new ones, such as apprenticeships and job shadowing for paid and unpaid work, institutions give recognition to the transitions that older adults confront.

As their postsecondary participation increases, these adults can lead the way to greater access and support for other groups of potential learners. As focus group and roundtable participants repeatedly reminded us, meeting the needs and expectations of older adults as they manage work and life transitions benefits other student groups as well. With multi-generational

communities of learners eager to learn, institutions will offer richer learning environments for learners in every sphere of their lives. Finally, by their vital engagement in lifelong learning, older adults not only learn for themselves, but also give back—to their communities and to those institutions that serve them.



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# Appendix 1: Methodology

## A. Older Adult Focus Groups

Two focus groups of older adults were convened in October 2007 at Anne Arundel Community College near Annapolis, Maryland, with the goal of learning about participants' experiences with and attitudes toward higher education.\* The groups—one comprising adults who had participated in lifelong learning programs in higher education and the other comprising adults who had not—represented diversity in gender, race and ethnicity, educational attainment, work status, income level, and disability status:

	No. of focus group members	Age range	Gender	Race/ethnicity	Educational attainment	Work status	Income level	Disability status
Focus Group 1 (higher education participants)	11	55–81	8 Female 3 Male	4 African-American 1 Hispanic 6 Caucasian	1 High School 2 Some College 2 Associate Degree 4 Bachelor's Degree 2 Master's Degree	2 full time 2 part time 4 completely retired 1 retired/volunteer 1 part-time volunteer 1 unemployed	3 \$15,001–\$30,000 4 \$30,001–\$45,000 1 \$45,001–\$60,000 2 \$60,001–\$75,000 1 \$75,001+	1 Disabled 10 No disability
Focus Group 2 (non-participants in higher education)	10	55–74	7 Female 3 Male	6 African-American 4 Caucasian	1 Some High School 2 High School Diploma 4 Some College 2 Bachelor's Degree 1 Master's Degree	6 retired 2 full time 1 part time 1 retired/part-time job	2 \$0–15,000 2 \$15,001–\$30,000 2 \$30,001–\$45,000 1 \$60,001–\$75,000 1 \$75,000+ 2 not reported	1 Disabled 9 No Disability

\*Focus group members' comments are cited throughout this report. Names are changed to protect their anonymity.



### Focus Group 1: Participants in Higher Education

1. In what classes and activities at Anne Arundel Community College are you currently participating?
  - a. Are you enrolled in certificate/degree programs? If so, for what reasons?
2. How did you hear about these classes/activities?
3. Why did you decide to come to college? What brought you here?
  - a. Do you plan to transfer to a four-year institution?
4. How do you think you've benefited from being here on campus?
  - a. If you are a distance education student, how has that benefited you?
5. How could your experience be improved?
  - a. Scheduling?
  - b. Programming?
  - c. Advising/Counseling—academic, personal, job-related?
  - d. Interactions with staff/faculty?
6. What other kinds of classes/activities would you like to see Anne Arundel offer?
7. What obstacles to participation have you encountered?
  - a. Transportation/distance?
    - i. Would you use shuttle service? From where?
  - b. Scheduling/programming?
  - c. Health/disability?
  - d. Fees?
  - e. Lack of information/understanding about programs for seniors?
    - i. Where do you get your news? What kind of advertising would appeal to you?
  - f. Discomfort/lack of confidence about college campus experience?
    - i. Would you participate with a group of friends?
  - g. Family/work/community obligations/support?
8. Based on your experiences, what do you think colleges and universities could do to encourage even more participation of older adults?
  - a. Better/different/more kinds of advertising?
  - b. Programming? Age segregation/integration?
  - c. Waivers/other kinds of financial support?
  - d. Online/face-to-face courses?
9. Is there anything else that you think colleges need to know about older adults?

### Focus Group 2: Non-participants in Higher Education

1. What kinds of classes and activities at Anne Arundel or any other college do you know about for older adults?
2. How have you learned about these classes or activities (friends, family, work, church, etc.)?
3. How do you think these classes and activities might help older adults?
4. Is there a class or activity in which you think you'd like to participate?
  - a. Would you consider an online class? Why or why not?
5. How do you think this class or activity might benefit you?
6. What are some of the obstacles that have kept you from participating? What other things have you heard people say about obstacles?
  - a. Transportation/distance?
    - i. Would you use shuttle service? From where?
  - b. Scheduling/programming?
  - c. Health/disability?
  - d. Fees?
  - e. Lack of information/understanding about programs for seniors?
    - i. Where do you get your news? What kind of advertising would appeal to you?
  - f. Discomfort/lack of confidence about college campus experience?
    - i. Would you participate with a group of friends?
7. What could Anne Arundel or any other college do to enable you to participate?
8. Based on your experiences, what do you think colleges and universities could do to encourage more participation of older adults?
9. Is there anything else that you think colleges need to know about older adults?

# Appendix 1: Methodology

## B. A National Survey of Colleges and Universities

In December 2007, all accredited degree-granting U.S. institutions were asked to participate in an online survey, which was developed with the assistance of ACE's Center for Policy Analysis. The primary goal was to collect data on educational programs and services that the nation's colleges and universities currently provide for adults aged 50 and older. This report analyzed the 585 responses from 3,894 contacted institutions.

Although the overall response rate (15 percent) is not high, the responding institutions are the types of colleges and universities that older adults are more likely to attend. As shown in the table below, 75 percent of all postsecondary students aged 50 or older were enrolled in public four-year or two-year institutions in 2005. Similarly, these types of institutions are well-represented in the survey responses, as they account for the majority of older students enrolled in the responding institutions (79 percent).

Percentage Distribution of Older Adults Aged 50 or Older Enrolled in Higher Education

	Responding Institutions	Total Higher Education Institutions
Public, four-year or above	38.3%	24.9%
Private not-for-profit, four-year or above	18.0%	17.3%
Private for-profit, four-year or above	2.4%	6.6%
Public, two-year	41.3%	50.1%
Private not-for-profit, two-year	0.0%	0.2%
Private for-profit, two-year	0.0%	0.9%
<b>Total</b>	<b>100%</b>	<b>100%</b>

# A National Survey of Colleges and Universities (continued)

## I. Institution Information

- 1) Institution Code (located in e-mail invitation):
- 2) Institution Name:
- 3) Does your institution identify students as “older adults” or “senior citizens” for program and service purposes?
  - Yes
  - No
  - Unsure.

If you selected no or unsure, please move forward to question 4.

- 3a) At what age do students reach “older adult student” status at your institution? Please specify the age:

## II. Financial Support

- 4) How are your senior citizen/older adult tuition waivers mandated?
  - By institutional policy
  - By state statute
  - By both institution and state
  - No tuition waivers offered
- 5) At what age do students first become eligible for a senior citizen/older adult tuition waiver?
- 6) How many students received these tuition waivers in fall 2006?
- 7) How many years has your institution offered senior citizen/older adult tuition waivers?
  - Less than 1 year
  - 1–5 years
  - 6–10 years
  - 11–15 years
  - More than 15 years
- 8) Which best describes your institution’s tuition waiver program for senior citizen/older adult students?
  - Partial coverage of tuition
  - Full coverage of tuition
- 9) What conditions limit the use of senior citizen/older adult tuition waivers? (Check all that apply)
  - Income cap
  - Space availability
  - Audit-only status
  - Noncredit courses only
  - Permission of instructor
  - No restrictions other than age
  - Other

If other, please specify:

- 10) Does your institution provide other financial assistance programs specifically for senior citizen/older adult students?
  - Yes
  - No

- 11) Select all other financial assistance programs available specifically for senior citizen/older adult students on your campus:
  - Scholarships
  - Book vouchers
  - Transportation vouchers
  - Coverage or waiver of student fees
  - Other

If other, please specify:

- 12) How are these other financial assistance programs funded? (Check all that apply)
  - Federal government
  - State government
  - Employers
  - Unions
  - Social/Professional organizations
  - Institutional funds
  - Other

If other, please specify:

## III. Programs and Services

- 13) Select the top three credit-bearing programs that enroll the largest concentrations of “older adult students”:  
(You may find it helpful to refer to the provided Classification of Instructional Programs [CIP] codes. These codes are used to report to the U.S. Department of Education.)
  - Business Management/Entrepreneurship (CIP code 52)
  - Fine Arts/Humanities (16, 23, 24, 50)
  - Gerontology (19.0702, 30.1101)
  - Human Services/Counseling/Social Work (42.06, 42.17, 42.18, 44.00, 44.04, 44.07, 44.99)
  - Health Services (51)
  - Teacher Education (13.12–13.15)
  - Other

If other, please specify:



## A National Survey of Colleges and Universities (continued)

14) Select all programs and services your institution offers to “older adult students”:

- Career transition
- Computer training
- ESL
- GED preparation/Basic skills
- Institute for Learning in Retirement (ILR)
- Osher Lifelong Learning Institute (OLLI)
- Retirement housing or community
- Road Scholar/Elderhostel
- Volunteer training
- Other

If other, please specify:

15) Estimate the proportion of “older adult students” who utilize the programs and services listed in Question 14:

- Less than 10 percent
- 10–30 percent
- 31–50 percent
- More than 50 percent
- Unsure

16) Estimate how often “older adult students” use job placement and career counseling services:

- Never
- Irregularly (once a term)
- Somewhat frequently (once a month)
- Frequently (once a week)
- Very frequently (every day)
- Unsure

17) Select all venues through which your institution provides programs and activities to “older adult students”:

- Main campus
- Branch campus(es)
- Senior citizen centers
- Nursing homes or assisted-living facilities
- Online
- Other

If other, please specify:

18) What options of assessing prior learning are offered to “older adult students” in your institution? (Check all that apply)

- AARTS/SMART (Military) transcripts
- ACE CREDIT transcripts
- Examinations
- Portfolios
- Workplace training evaluations
- None

19) Among the options listed in Question 18, which is most used by “older adult students” on your campus?

- AARTS/SMART (Military) transcripts
- ACE CREDIT transcripts
- Examinations
- Portfolios
- Workplace training evaluations
- None

20) Select all specialized course options provided by your institution:

- Accelerated degree programs
- Contract programs for local employers or unions
- Night/Weekend programs
- None of the above

21) Which specialized course option is most used by “older adult students” on your campus?

- Accelerated degree programs
- Contract programs for local employers or unions
- Night/Weekend programs
- None of the above

### IV. Outreach

22) Is your campus directly accessible via public transportation?

- Yes
- No

23) Select all marketing formats your institution uses to target the older adult population:

- Print advertisement
- Commercials (Radio)
- Commercials (Television)
- Direct mail
- Institution’s web site
- Institution’s catalog
- Internet advertising
- Exhibits/Presentations
- No marketing focused on older adults

24) Are senior citizen/older adult tuition waivers mentioned in your institution’s marketing?

- Yes
- No
- No tuition waivers offered
- No marketing focused on older adults

# Appendix 1: Methodology

## C. Roundtable Discussions of Higher Education and Other Sector Leaders

Two regional roundtables—in Mesa, Arizona, hosted by Mesa Community College, and in Indianapolis, Indiana, hosted by University of Indianapolis—brought together a total of 24 higher education, community, and state government leaders, as well as researchers. Each roundtable discussion focused on the shifting demographics on their campuses; which older student populations they were serving most effectively, and which ones they weren't; and what policy changes need to occur at the institutional, state, and federal levels to better serve the educational needs of older adults.

### Participants: Mesa Roundtable

Charles Middleton, President, Roosevelt University  
*(facilitator)*  
Penny Armstrong, Assistant Provost for Outreach and Extended Programs, Kentucky State University  
Connie Boehler, Emeritus Department Chair, Coastline Community College  
Jay Halfond, Dean, Metropolitan College, Boston University  
Alberto Olivas, Director of Voter Outreach, Maricopa Community College's Center for Public Policy  
Shouan Pan, President, Mesa Community College  
Bernie Ronan, Executive Director, Maricopa Community College's Center for Public Policy  
Kathleen Schatzberg, President, Cape Cod Community College  
Melanie Starns, Director, Office on Aging, State of Arizona  
Linda Thor, President, Rio Salado Community College  
Hope Williams, President, North Carolina Independent Colleges and Universities

### Participants: Indianapolis Roundtable

Charles Middleton, President, Roosevelt University  
*(facilitator)*  
Nick Allen, Provost Emeritus, University of Maryland University College  
Kay Crawford, Senior Fellow, Center for Aging & Community, University of Indianapolis  
Shelley Gimenez, Dean, School of Continuing Education, Eastern Connecticut State University  
Judy Kuipers, President, Fielding Graduate University  
Elmira Mangum, Senior Associate Provost, University of North Carolina, Chapel Hill  
Kathleen Moore, Associate Vice President, Academic Affairs and Educational Outreach, University of South Florida  
Martha Nesbitt, President, Gainesville State College  
Beverley Pitts, President, University of Indianapolis  
Judith Ramaley, President, Winona State University  
Martha Smith, President, Anne Arundel Community College  
Roger Sublett, President, Union Institute and University  
Graham Toft, President, GrowthEconomics, Inc.  
Teresa Voors, Commissioner, Workforce Development, State of Indiana

## Roundtable Discussions: List of Questions

### Mapping the Shifting Demographics of an Aging America

- What demographic shifts in aging have you observed on your campuses and in the communities that you serve?
- How have older adults' needs and expectations shifted (work/learning/retirement)?
- How have these shifts already impacted your institution? How do you think these demographic trends will affect future programs and services?

### Meeting the Changing Needs and Expectations of Older Adults

- What do you see as your institution's role in serving older adults—currently and in the future?
- Who are the older adults you are currently serving most effectively? Who are the groups of older adults that need to be more effectively served by colleges and universities? Who has been left out of the picture?
- What are the barriers for both older adults and higher education institutions?
- What initiatives, programs, or policies for older adults has your institution put into place that could offer models for other campuses?

### The Shifting Roles for Higher Education

- What changes in policy and practice should occur at the institutional, local, state, and national levels in order to better meet older adults' educational needs? Consider the following areas:
  - **Outreach:** What messages and outreach strategies would most effectively reach members of this diverse population and widen postsecondary participation?
  - **Programs and Services:** How can higher education best meet older adults' growing interest and demand for programs that respond to their immediate needs for career retooling and job placement?
  - **Financing:** What innovative ideas exist at the institutional, local, state, and national levels?
  - **Other areas?**
- How do you think your institution could build on its partnerships with business/industry, government, and other sectors to better meet older adults' postsecondary needs?
- What additional steps could ACE take to support your efforts to better serve older adults?



## Appendix 2: Summary of First Report: *Framing New Terrain* (2007)

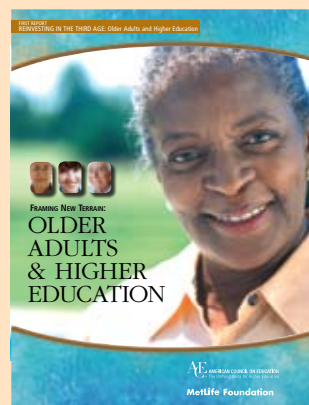
In 2004, 54.2 million people in the United States were between the ages of 55 and 79, constituting about 19 percent of the American population—and that number is rising. Although these adults are “retirement age,” there is little retiring about them. Recent research indicates that a majority of adults in this age group plan to stay engaged in some form of work, community service, or learning activity—plans that will undoubtedly impact higher education.

Currently, about 30 percent of Americans aged 55 to 59 hold a bachelor’s degree or higher, compared with 25 percent of those aged 60 to 69 and 18 percent of adults aged 70 and older. This makes today’s 55- to 79-year-old age group the most educated older adult population in history. It is also the most affluent, with only 10 percent living below the poverty line. However, discussions about the relative wealth of older adults mask the widening gap between the haves and the have-nots—something higher education needs to consider as it strives to serve all older adults, not only those with means.

Colleges and universities must also consider the motivating factors that drive this population to seek additional education. Older adults who pursue higher education do so primarily for intellectual stimulation, sociability, and skills enhancement. Re-tooling for a new career will continue to gain importance as increasing numbers of older adults continue to work—particularly for those on the younger end of the 55 to 79 age spectrum. A recent survey of 1,000 adults aged 50 to 70 found that 66 percent of the respondents plan to work during the traditional retirement years. Studies have shown that those with at least some college are nearly twice as likely to work past traditional retirement age as those without a high school diploma.

Yet the vast majority of older adults are *not* pursuing additional education—particularly through higher education venues. Demographic, attitudinal, and structural barriers impede access at several points along the lifelong learning journey. Age, with its accompanying responsibilities, complicates decisions about lifelong learning participation, especially for people in their 50s and early 60s who often carry multiple family and work obligations. Race and ethnicity also present barriers to higher edu-

This snapshot highlights findings from *Framing New Terrain: Older Adults and Higher Education*, the first report from Reinvesting in the Third Age, a two-year project funded by MetLife



Foundation. The report offers an overview of the lifelong learning landscape for the growing older adult population based on an extensive review of research literature and a range of interviews with higher education and other leaders. *Framing New Terrain* describes the changing demographics of adults aged 55 to 79; their various motivations for participating in higher education, including increased interest in retooling for new careers; and the numerous obstacles that prevent broader participation.

For a copy of the full report, e-mail [reinvestinginthethirdage@ace.nche.edu](mailto:reinvestinginthethirdage@ace.nche.edu) or call (202) 375-7540.

cation, because minorities more often experience poor health and inadequate medical care throughout their lives than do whites, and fewer have a college degree—a primary indicator of one’s inclination to pursue a degree. In addition, external and internal barriers play a role, such as ageism on college campuses, as well as older adults’ own negative attitudes toward education geared toward “seniors” or “older” adults. Further, structural barriers, including lack of

transportation, support services, and financing, often keep older adults—particularly minorities and individuals with low incomes—out of the classroom. Lack of funding is another barrier. In fact, it is consistently cited as one of the top reasons why older adults don't pursue higher education. And while financial aid programs for older adults do exist, navigating the complexity of options can be challenging.

The broad diversity of older adults' experience, interests, needs, and motivations—coupled with outreach, programming, and funding barriers—pose numerous questions for higher education about reframing its policies and practices. For example, should higher education create separate programs

for older adults or incorporate them into existing, intergenerational programs? How can higher education provide financial aid to this population without discriminating against younger students (as some tuition waiver programs for seniors have been accused of doing)? It's clear that both older adults and higher education are discovering new ways to reinvest in the third age of life. It is also evident that this population presents numerous opportunities and challenges for higher education and communities alike—both as a potential market to grow and enrich lifelong learning programs, and as a talent pool to meet mounting workforce needs.



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### ACE's Center for Lifelong Learning

Since 1942, the Center for Lifelong Learning at the American Council on Education has been a national leader in shaping policies, practices, and perceptions about continuous learning across sectors. Through research and policy development, program evaluations, online publications, transcript services, and advisory and advocacy services, the Center supports greater postsecondary access and success. For more information, visit our web site at [www.acenet.edu/clll](http://www.acenet.edu/clll).



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