

OLDER ADULTS AND HIGHER EDUCATION

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The elderly in our society have rarely been considered in educational planning, mostly because education has been conceived as a capital investment which is accumulated in youth in the expectation of an appropriate pay-off in adulthood. Moreover, for most of the years of this century, educational institutions have basked in the dubious luxury of having more students than they could handle, with constant pressures to provide an evermore egalitarian approach to educating the youth of the nation. Thus there has been little incentive to consider older people as an appropriate clientele. But changing conditions are forcing planners to think about new roles for education in society and in the lives of an increasingly older population. The following facts constitute a challenge to higher education:

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- Numerically, those 65 years of age and older are increasing rapidly--from 12 million in 1950 to a projected 50 million by 2025. Furthermore, they constitute a growing proportion of the population--from 8 percent in 1950 to 17 percent by 2025 (Current Population Reports, 1977, P - 25, No. 704). In contrast, the population of 18 year-olds which used to provide the constituency for colleges is diminishing; by 1992 there will be 25 percent fewer 18 year-olds in the United States than there were in 1975.
- The elderly are one of the most educationally disadvantaged sub-groups in America. Ten percent of those 65 and older are regarded as functional illiterates (having four years of schooling or less) while only a little more than half (56 percent) have gone beyond the eighth grade (Current Population Reports, 1978, P - 20, No. 314).
- Interest and participation in learning activities are related to age, and both show sharp decreases after age 55 (Cross, 1979). Fewer than 5 percent of those 55 and older were participating in any form of organized learning in 1978. This participation rate is far lower than for other population subgroups commonly thought of as educationally disadvantaged--Black, rural or inner city populations, and low-income groups.
- Retirement has a significant impact on society, as well as on individuals. Never before in history have so many lived to be able to retire and to be retired for so long. It is estimated that years of retirement for the average man will increase from the present 13 years to 25-28 years (Neugarten, 1975). Health will be better, and more elderly than ever before can be expected to enjoy long lives and to continue to contribute to society.
- In virtually all studies of the barriers to educational activity "lack of time" is cited as a major problem for large numbers of would-be learners (Cross, 1979). Retired persons are a distinctive subgroup of adults who do not share this major deterrent to adult education. Thus they present a unique opportunity and responsibility to educators.

The major conclusion to be drawn from the above facts is that the potential for growth in educational participation on the part of the elderly is enormous. They are under-represented now; their numbers will grow; they will have time and health for participation in a wide variety of activities. At the same time, it is clear that many colleges are seeking new clientele to cushion the drop in 18-24 year-olds in the population and are ready and eager to serve older learners. Perhaps the two needs can be brought together to the ultimate benefit of the total society. The discussion in this paper will center around two questions:

- 1) What are the educational needs of the elderly that might be addressed by higher education?
- 2) What are the trends in higher education that will act as incentives or deterrents to develop new programs for the elderly?

The Educational Needs of the Elderly

There are two major sources of information about the educational needs and interests of the elderly. One is through experience and analysis of those working with adult education; the other is through numerous surveys conducted in the early 1970s when it became apparent that there would be "excess capacity" in educational

institutions that could, to the advantage of all concerned, be utilized by adults.

The surveys are helpful in providing much needed data about the attitudes of the elderly toward education, but there are several limitations. First, since the surveys had to cover the entire spectrum of adult educational interests from age 25 to 85, few explored in any depth the unique needs of the elderly. Second, people respond to surveys on the basis of what they know and have experienced. They are not usually very good at visualizing something that might be quite attractive to them were they to see it. Thus, needs assessments are more likely to reflect the past and what people know than the future and what might be.

Despite these limitations, it is possible to get a rather consistent picture of the attitudes of the elderly toward further education by synthesizing findings across studies. When that is done, it is clear that the elderly form a singularly distinctive subgroup in terms of educational needs and interests. There are more pronounced differences between the learning interests of young and old than between rich and poor, men and women, black and white, or rural and urban residents. Daniel and his colleagues (1977) found that even among credit students in community colleges, the value orientation of those 60 and older was "completely different than that of any

other age group."

Much of the difference is colored by the motivation for learning. Those relatively few elderly who do express an interest in further learning are not primarily interested in the "capital investment" of education--an interest that predominates with other age groups. The elderly are free to learn what they want to learn, but the content will have to be relevant to their needs. Older learners are quite unlikely to participate in a boring experience in the promise of some future reward. According to the needs assessments, two motivations for learning lead all others in mentions by the elderly; they are "for personal satisfaction" and "to meet new people" or variations on those themes (Hefferlin, Peterson, and Roelfs, 1975; New York, 1977).

Some of this interest may be spurious because many needs assessments are biased, consciously or not, toward capital investment motives for learning. The surveys typically list a variety of job-related motivations, giving career-oriented learners many choices, but leaving people who are not taking education "to get ahead in the world" only a few rather general reasons for learning, such as "to become better informed" and "for personal satisfaction." Thus responses for those who lack career motivation tend to pile up in the more general categories.

Nevertheless, the pattern of learning interests for the elderly has an internal consistency that conveys a fairly good picture about what kinds of subject matter are of interest. Most surveys show substantial interest in arts and crafts, and older learners almost always indicate more interest in the humanities than younger learners do. Twenty percent of the California residents 60 years of age and older expressed an interest in the humanities, second only to arts and crafts which polled a 33 percent response (Hefferlin, Peterson, and Roelfs, 1975). In the Maine needs assessment (Kovenock, 1978), a category labeled Social Sciences and Humanities was of more interest to older age groups than to younger and was first choice among those over 65. Wasserman (1976) also found more interest in the social sciences, humanities, and languages than in other college courses.

Other findings from the needs assessments give some help on the practical aspects of planning programs for older learners. The findings are more likely to confirm the experience of practitioners than to offer any surprises, but a profile of needs and interests with respect to delivery methods, schedules, and other conditions of learning may prove useful.¹ Convenience and ease of participation

¹Conclusions in this section are drawn from statewide needs assessments that reported data by an age group of 60 and older (Hoyt, 1975; Florida, 1976; Hefferlin, Peterson, and Roelfs, 1975; New York, 1977; Barlow and Timireus, 1975).

show up consistently in the responses of older people to questions about the conditions that would be required or attractive in learning programs. Travel is a problem for many. They are not willing to travel as far as younger learners, nor are they much interested in going out at night. The most popular times for learning activities are weekdays, preferably at classes meeting not more than once a week. Older learners almost always rate convenience and location over prestige, and they are much more likely than younger age groups to be interested in using community agencies such as adult learning centers or churches in preference to college campuses.

There is also some evidence that older people with health and transportation problems can be reached through television. Testimony to Congress reported that elderly persons devote more time to television than to any other activity except sleeping (Adult and Continuing Education Today, September 19, 1977). They not only spend more time viewing television than younger people, but about half of the Kansas respondents over 60 years of age said offering learning programs on local television would have advantages to them. Interestingly enough, older people spend less time than younger people listening to radio, and people of all ages are more likely to say that offering a course by radio would be a disadvantage whereas offering it on television would be an advantage (Hoyt, 1975).

Although the psychological learning environment has not been probed very deeply in the statewide needs assessments, what little data there are support the conclusion that older people want learning to be a pleasant, non-pressured experience. They, more than younger people, say that it is important that the course should not be too difficult, that grades should not be given, that the class should be small and their learning companions should be similar to them in background (37 percent rate this very or moderately important), and in age (25 percent rate it very or moderately important, in Hoyt, 1975).

As for barriers to learning for older people, the needs assessments are fairly consistent in showing that cost is not as much of a deterrent to older as to younger (18-29) learners. This is not to say that it is unimportant; over half of the older Californians said they could not afford to pay more than \$45 per course (Hefferlin, Peterson, and Roelfs, 1975), but cost is not often selected as the major barrier to learning for older people. Since the incomes of the elderly as a group are low, some explanation seems required.

One possible explanation lies in the finding that in almost all studies, the overwhelming deterrent to learning among those 60 years of age and older is that they feel "too old." As long as that barrier exists, it doesn't make much difference what the cost is, it is not perceived

as preventing them from doing something that they don't want to do anyway. Ironically, since the poorly educated are more likely than their better educated peers to say that they feel too old for learning, the barrier of cost appears relatively less important to poor (and uneducated) people than to those who are better off.

Another possible reason why older people don't view cost as a major obstacle lies in the psychology of the age cohort. Whereas younger people have grown up in an era of free education and substantial financial aid, older people grew up in the years when governmental subsidies for postsecondary education were not a common fact of life. They may still think of education beyond high school as a luxury available to those who can pay for it.

In the light of these analyses and interpretations from the needs assessments, it is instructive to look at a program that has been fairly popular with colleges seeking to fill seats left vacant by the declining 18-24 year-old population. Many colleges have offered free tuition to senior citizens wishing to attend college classes on a space-available basis. Such programs appear to fly in the face of much of the evidence offered in the needs assessments. Transportation to college campuses, which are not the preferred places of learning for the elderly, may be difficult. Courses designed for academic credit are not likely to meet the identified needs of

the elderly, and they are likely to be conducted in a competitive atmosphere, even if the adult learner is not a direct competitor. Moreover, classroom lectures or other traditional methods of instruction do not utilize the experience of older learners and their desire to contribute to the discussion (Knowles, 1978). And as Weinstock (1978) points out, there is something degrading about being permitted to attend as a second-class citizen after "regular" students are accommodated. Finally, free tuition, while nice, does not appear to remove a major barrier to learning for older people.

While most authorities on adult education commend the motivation behind the free tuition programs, most also agree that they are ill-designed to meet the needs of most elderly people (Weinstock, 1978; Moody, 1978). This criticism is not intended to recommend the abolition of such programs; apparently they do meet the needs of those who participate. If they are as inappropriate as this analysis suggests, they will die out naturally as more attractive options become available.

Since most surveys show not only a lack of participation on the part of the elderly but also a lack of interest, it is important to look at this issue more closely. Interest in further learning starts to decline in the early thirties and drops off sharply after age 55. The Iowa statewide study of adult learning interests (Hamilton, 1976)

found that 98 percent of those 65 and older said they had no interest in engaging in "further learning beyond high school...within the next two years," and 90 percent said they would not be interested in educational services to assist them in further learning. In Kansas (Hoyt, 1975), 85 percent of those 60 and older said they had given no serious consideration to continuing their education, and over three-fourths said any involvement in continuing their education within the next two or three years was unlikely. Although the participation rate of those 55 and older has shown a slight rise in recent years (from 2.9 percent in 1969 to 4.5 percent in 1978), education for the elderly is not even close to providing the individual and societal benefits that are possible and desirable.

In most surveys "feeling too old" was a major barrier to adult education for large numbers (over half in some surveys) of older people (Cross, 1979). The self-perception of age as a barrier seems to be more a psychological than physiological problem. Relatively few cite health factors as constituting any barrier. Rather, the problem seems to lie in the pervasiveness of the "capital investment" perception of education. Kovenok (1978) found that as people age, they are increasingly likely ($r = .35$) to say that one of their reasons for not participating in education is that "further learning won't help much." There appears

to be a major problem in educating the elderly (and others too, for that matter) to the value of education on terms other than as capital investment. McClusky (1971, p. 4) has written perceptively of the expressive needs of the elderly:

In most people--especially in the later years because of postponed desires--there is a large domain of unexpressed and underexpressed talent and interest, which if properly cultivated, could be activated to enrich one's living. The later years, therefore, should be the vital years for the liberation of the expressive needs. For one thing, there is more time. For another, given a margin of health and income, there are fewer restraints to interfere with the cultivation of expressive activities.

Others have analysed humanist needs in other terms, and the elderly themselves have responded with enthusiasm to the development of humanistically oriented curricula such as Elderhostel and NCOA's Senior Center Humanities Program. Once the capital investment in education ceases to be a priority, learners are freed of many constraints that plague traditional education. They need not worry about how others will evaluate their learning, i.e., about the "credibility" of the education, and they are free to choose courses that are interesting and useful to them.

There is, however, a problem in our society in paying for education that is intrinsically satisfying as opposed to education that is goal-oriented. Survey data suggest that people are willing to pay more for education that has

a future monetary pay-off (Cross, 1981). This means that if society expects to reap the benefits of better education for older generations, we will have to develop new, affordable, educational opportunities that serve the differing needs of the various stages of life. Education for "self-satisfaction" is as important for the elderly as education for "job advancement" is to younger people.

A second way to analyse the educational needs of the elderly is to turn to experiential and theoretical analyses. This approach has the advantage of using the vision of scholars and practitioners about what might be, in contrast to surveys which most always have difficulty conveying future options to respondents mired in the present.

One useful framework for assessing the social and personal benefits of education is the needs hierarchy proposed by McClusky (1971) in his position paper for the 1971 White House Conference on Aging. He identified four needs of older people: coping needs, expressive needs, contributive needs, and influence needs. Coping needs are met by education related to the life-stage problems of the elderly with health, finances, nutrition, housing, etc.. Expressive needs are those which are met by learning activities which are enjoyable in and of themselves. Contributive needs are based on the assumption that older people have a need to give to others and to feel needed and

wanted. Influence needs are addressed by education that helps older people exert influence on the circumstances of their lives and the world about them.

Although there is support for McClusky's needs hierarchy in the research and scholarly literature on education for the aging, public perceptions and public policies lag far behind. Public policy, for example, frequently assumes that the elderly need to be "taken care of," while a common public perception is that retirees need "something to keep them occupied." Both of these views contribute to a reluctance to spend scarce funds on educational programs which are seen as of little social or personal benefit.

In a background paper prepared for the Project on Lifelong Learning, Moody (1978) addresses the issue of coping needs. He proposes a shift in public policy to make the elderly more independent through educational programs piggy-backed onto existing direct-care programs for housing, nutrition, health, etc.. He observes that money for direct services "will never be sufficient to meet basic needs as long as the elderly themselves are not trained to provide for their own needs" (. 14).

He illustrates his proposal in a series of questions:

Is crime against the elderly a problem? Then we need to train older people in crime prevention, in how to avoid victimization, in how to organize block associations, block watchers, and other community groups. Is health care for older people a problem? Then, perhaps we need to invest in preventive medicine, in teaching senior citizens about self-care, home health care, about the need to recognize symptoms requiring medical attention, about health

education. Is income a problem for older people? Then, why not invest in educating our older citizens in consumer buying, budget planning, ways of increasing their real income and receiving authorized entitlements?

Of course health care, income, and crime are major problems for senior citizens, but these needs aren't alternatives to education: they are precisely the areas where we should be spending a modest investment in adult education in order to help older citizens toward autonomy and dignity (p. 13).

For the health of society as well as individuals, we need to find ways, not only to enhance the independence of the elderly (coping skills), but to use their time and talents for the betterment of society (contributory skills). The coping and contributory needs of older people may differ in kind from those of younger people, but they probably do not differ in degree. Thus, if our public policy is to support educational programs that address coping and contributory needs (which generally it seems to be), then we may need to redefine what those needs are for people in the different stages of life. What skills and information do the elderly need to cope with the problems of their life-stage? What contributions are the elderly uniquely well-suited to make? How can these needs be met through education? We need more experimentation and evaluation of educational programs that perform the dual duty of enhancing the self-esteem and independence of the elderly while making a real and positive contribution to society.

Incentives and Deterrents in Trends in Higher Education

Although education for the elderly frequently evokes idealistic sentiments, I have chosen to take a rather pragmatic approach to the question of how higher education might serve the elderly, believing that in lean times it is more realistic to talk about incentives and deterrents than ideals and obligations. One way to pragmatically assess what is feasible in educational services is to list some of the current trends in higher education and to analyse each for implications for services to the elderly. My use of the word "trends" is not meant to suggest that those interested in education for older people should passively accept whatever appears to be happening in higher education. Rather, I use the term to create an awareness of the ease or difficulty in capitalizing on a favorable trend or bucking an unfavorable one. Although all of the trends cited below can be documented and expanded, most seem self-evident and hence discussion will be brief.

1. Trend. The aging of the baby boom generation and the shift in demographics toward an aging America is creating excess capacity in higher education.

Implications. On the positive side, this forces institutions to look for new clientele and to think about the type of educational services that will attract them.

On the negative side, most of the excess capacity in colleges is in the northeast and midwest regions of the country and not in the Sunbelt where older people tend to congregate. Nevertheless, for those colleges that seek new markets for their services, there is a new and growing motivation for identifying unmet needs and new clientele.

Such incentive has resulted in many innovations that serve simultaneously the needs of colleges and of older learners. Some campuses with excess housing, for example, are experimenting with living/learning centers for the elderly. Some are utilizing off-peak morning hours to schedule classes for older adults who seem to be one of the few potential student groups preferring morning classes. Most are open to suggestions and are actively searching for new ways to serve.

2. Trend. For several decades now there has been a shift toward career-oriented education. This leaves an excess capacity in the liberal arts for many colleges.

Implications. Many liberal arts colleges had hoped to capitalize on the growing adult market to sustain the humanities and arts, but it turns out that the adults constituting the bulk of the new learners (those between the ages of 25 and 40) are just as career-minded as younger people. Hence, the elderly (the only group identified in the needs assessments as not career-oriented) may constitute a uniquely promising market for the liberal arts.

Elderhostel is a beautiful example of capitalizing on this situation.

3. Trend. There is a trend toward granting academic credit for learning accomplished outside of traditional education. At the same time, colleges have been launching non-credit programs since the late 1960s when the potential of the adult market became clear. Thus, there is a blurring of old perceptions of colleges as exclusively interested in degree-credit education.

Implications. The elderly are generally not interested in academic credit, hence they do not constitute an especially promising market for the new credit options now offered by so many colleges. On the other hand, there would appear to be a ready market among the elderly for many of the non-credit options now offered by most institutions of higher education. Increasingly, however, non-credit options are expected to pay their own way. This means that publicly subsidized credit learning will benefit largely younger people, whereas tuition-supported non-credit classes will benefit primarily the well-educated and well-off elderly. Many states fund non-credit basic education classes, thus benefiting the elderly with low levels of education. This seems to leave the elderly person with perhaps a high school education with little attention from anyone. There is a need for low-cost classes that provide education for the middle-class elderly.

4. Trend. There is a trend toward more cooperation between higher education and other educational providers in the society, e.g., corporations and senior citizens centers.

Implications. As the benefits of cooperation catch on, colleges will seek partnerships with agencies that can offer potential students and the funds to support them. As budgets tighten on all social services, colleges may look increasingly to corporations for students--a market almost totally devoid of the elderly. Attention needs to be given to incentives for cooperation between colleges and organizations of the elderly. Consumer groups banding together to request particular courses or programs have been quite effective in getting the services they want because they do the "recruiting" for colleges. Another increasingly popular form of cooperation between colleges and other agencies (e.g., senior centers, hospitals, churches, and community agencies) is for colleges to provide program planning and instructional personnel while other agencies provide convenient locations and support services.

5. Trend. There has been a strong trend in recent years toward taking education to students--through technology and off-campus centers. There is, however, new concern expressed about the quality of off-campus programs.

Implications. "Portable education" is clearly a plus for place-bound elderly. Concern about quality seems to be resulting in some retreat from off-campus credit programs. How or whether it will affect non-credit programs is not clear. It may suggest closer monitoring of both the quality and accesibility of non-credit programs for the elderly.

6. Trend. The legislation calling for accesibility for the handicapped to campus buildings has resulted in massive physical modifications as well as more sensitivity and awareness of the problems of the handicapped.

Implications. The positive implications are clear for "mainstreaming" handicapped elderly into a variety of on-campus programs.

7. Trend. Because higher education is in an era of no growth, college faculties are aging.

Implications. On the positive side, there may be more faculty identification with the needs and interests of the elderly. On the negative side, there will be no "new blood" coming onto college faculties to respond to new conditions and to initiate new ideas. Most adaptation to the new conditions of higher education in the 1980s (teaching the elderly, for example) will have to depend on "faculty development" rather than on hiring new people to do new things. However, many faculty development programs

are working to reorient teachers to the needs of older populations, and there is a heightened awareness of phenomena such as life cycles and andragogy, and more sophistication in the study of gerontology.

8. Trend. Many states have based funding of higher education on the concept of full-time equivalent (FTE) students. But with the growth of part-time enrollments, states are studying the problem and attempting to devise more equitable funding formulas.

Implications. With the dramatic increase in part-time students of all ages, the old funding formulas based heavily on FTE are increasingly unsatisfactory. They act as disincentives for institutions to expand their services to part-time students. More realistic funding formulas should consider overhead costs generated by headcount (as opposed to FTE), and any moves in this direction will encourage institutions to do a better job of providing for the needs of part-time students, including the elderly.

9. Trend. In public higher education, and especially in community colleges, there is a move away from local funding toward state funding.

Implications. It is very hard to say whether the elderly will get more attention or less as funding (and frequently decisions) are moved away from local communities. It probably does suggest that the elderly should

give more attention to the power of state-wide organizations able to represent their educational interests in the state capitol.

10. Trend. The federal government is decreasing funding for state Educational Information Centers which have provided information about available educational opportunities for adult learners.

Implications. Some studies have concluded that the major problem in adult education is really not the supply of adequate programs but rather the problem of getting learners and providers together. (See Cross, 1978) This depends on getting information about opportunities into the hands of prospective students. Perhaps the most effective way to counter the trend toward less information is for communication networks, including magazines and news reports serving the elderly, to give far more attention to publicizing educational opportunities for the elderly.

11. Trend. There is a rapid increase in the application of technology to the delivery of education. However current policies regarding recognition, student assistance, interstate licensure and accreditation, funding, and allocation of the airways, pose numerous barriers to utilizing the new technology effectively and efficiently.

Implications. As practices are revised and improved, the use of technology to deliver a wide variety of educational programming should become vastly better.

12. Trend. There are fewer funds available from either federal or state coffers for research and development on the educational needs of the elderly.

Implications. The drying-up of research and development money suggests that programs studying the needs of the elderly will have to develop independent sources of funding. Wills and bequests offer an under-utilized resource which might be effectively tapped by fundraisers among the elderly.

Conclusions

Clearly, there are ample opportunities in this decade to increase educational services for older learners. There is much about the "depression" in higher education that can be turned to the advantage of the elderly if needs are articulated and strategies devised to capitalize on current trends in higher education. The purpose of this paper has been to present a brief description of what is known about the educational interests of the elderly through research and to face that knowledge with what we know about current trends in higher education to see where useful

connections might be made. The potential for making significant strides in educational programming for the elderly is clearly present.

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