

# **Literature Review on Adult Learners**

## CONTENTS

Learner Characteristics	2
Enrolment Motivation	2
Intermittent and Disjointed Studies	2
Barriers to Enrolling	4
Basic Skills and Preparatory Learning	5
Persistence	6
Retirees	8
Institutional Responses to Adult Learners	9
Private Institutions	9
Curriculum	10
Delivery Methods	10
Distance and Online Learning	11
Student Services	12
Conclusions	12
Sources	14

## **Learner Characteristics**

### **Enrolment Motivation**

Some sort of employment benefit is frequently important in adults' decision to enroll in a program of studies, as distinct from enrolling in individual courses. Those who work in large firms, in managerial and professional occupations, and more generally in jobs that demand knowledge, are the most likely to return to school.

Although job-related education is central to individuals age 25 and over, those students typically value programs that address topics and interests that go beyond what is needed from a solely utilitarian perspective. "They want to be pushed intellectually, to think critically, and to expand their mind." (Tabin, 2007). Pusser et al (2007) report:

*Ironically, although many postsecondary programs for adults focus on workforce training, the majority [of respondents to the national American survey of students in continuing education] reported that acquiring knowledge is a higher priority than is embracing employability.*

Rather than debating the relative merits of applied versus liberal education, it appears that the successful programs include both components in their curriculum.

### **Intermittent and Disjointed Studies**

A recent report on *Returning to Learning* from the Lumina Foundation for Education (Pusser et al, 2007) emphasizes that the enrolment patterns of adults are distinct from those of the historic mainstay of undergraduate education, recent high school leavers:

*Rarely are adult learners' higher education enrollments continuous; such students may enroll in courses to meet short-term goals (such as specified labor market skill development), withdraw for a period of time, and then re-enroll...*

*...adults often follow nontraditional pathways, such as continuing education and extension programs, contract education arrangements and programs offered online, at satellite campuses, or at for-profit colleges...*

*A vast world of site-based and online, short-term, non-credit classes now serve millions of learners. Because it is often excluded from state resource-allocation models, this "hidden college" is little understood by policymakers. Yet, because of the demands of the emerging economy, this arena is critical to the nation's future....*

*The well-worn path will not work for most adult learners. Many adult students choose nontraditional paths to postsecondary education because they work, are responsible for dependents, and can sometimes obtain tuition assistance from an employer if they enroll in a part-time program. These pathways often offer fewer resources per student than do traditional resident and commuter campuses. Their range of curricular options is*

*distinctly different. Adult learners generally seek convenient access and a high degree of certainty in choosing a program. As a result, they may select private or for-profit institutions that offer organized programs specifically designed to serve them.*

Two implications of adults' circuitous pathways are that postsecondary education needs (1) to do a better job of helping adults document and transcript their learning and (2) to help learners map a pathway through the wide range of courses in order to earn a credential that testifies to their knowledge, skills and abilities.

*Adult students are not well documented, are frequently left out of discussion of higher-education policy, and are not fully understood by the colleges they attend, says a report released this week by the Lumina Foundation for Education. As a result, those students often have no clear, viable paths to earning bachelor degrees and establishing careers.*

*A key flaw, the report says, is the gap between noncredit study – like remedial education and job-related training – and degree programs. Many adult students start in noncredit, skills-related programs and, after months and even years of effort, make no progress toward earning associate or bachelor's degrees.*

- Ashburn, 2007

In the words of the Lumina report:

*Institutions must better understand and document learners' patterns of credit-bearing and non-credit-bearing course enrollment. Pre-baccalaureate programs should increasingly be linked to credit attainment. The "hidden college" of non-credit, revenue-generating courses should also become a pathway to credit-bearing certificates and credentialing.*

- Pusser et al, 2007

Work already done in BC regarding Prior Learning and Recognition (PLAR) and the BC credit bank, maintained by Thompson Rivers University – Open Learning, could the inform the transcribing of learning that adults may have acquired from two or three different careers or from any number of credit and non-credit postsecondary courses at a variety of institutions and organizations.

The Lumina report comes to a strong conclusion about the importance of academic advising and educational planning:

*To find the right path, adult learners need a guide. Few factors influence adult learners' success more than student/institutional planning and counseling. Mapping the students' path to postsecondary success is crucial.*

- Pusser et al, 2007

This conclusion seems consistent with other literature, but the other sources address educational planning more tangentially. For example:

*Adult students would like complete and easily accessible information about courses and programs so as to make informed choices – e.g. course outlines available online ahead of*

*time, with full biographical information on the instructor – so they can choose their course carefully.*

*- Tabin, 2007*

Given the intermittent and disjointed course-taking patterns of adults, postsecondary institutions will need to consider the extent to which they want to facilitate this pattern rather than to encourage patterns that are less fragmented. To the extent they wish to accommodate circuitous pathways, the question arises about the extent to which it is practical for individual institutions, in contrast to consortia, to respond on their own.

## **Barriers to Enrolling**

*There is no ‘one size fits all’ solution to reducing barriers.*

*- Canadian Council on Learning, 2007*

Despite some authors’ attempts to devise categories for thinking about attendance barriers, there does not seem to be any consensus. The simplest taxonomy is binary:

*There are two types of non-participants: those with no interest and those who have interest but are prevented from participating because of barriers.*

*- Canadian Council on Learning, 2007*

Those most needing upgrading are often not interested. The Conference Board of Canada found in 2006 that “many workers with insufficient literacy skills were overly confident about their own abilities and felt that literacy skills had little impact on their job or future employment prospects.”

Myers and de Broucker (2006) take a more elaborate approach in their taxonomy of barriers:

Structural

e.g. lack of awareness, lack of governmental and employer support

Institutional:

e.g. lack of resources to develop customized programs for adults, inappropriate pedagogy, inconvenient course scheduling

Individual:

e.g. finances, work conflicts, family responsibilities, attitudes, and qualifications

Many articles and studies discuss individual barriers such as finance and attitudes. Finances are clearly a barrier, but:

*Financial support is often not a sufficient incentive. The OECD highlights the importance of flexible learning arrangements targeted to the specific needs of learners.”*

*- Canadian Council on Learning (2007)*

*The public tends to overestimate the cost of tuition and related fees. The lower the family income of the respondents, the higher his or her estimate of postsecondary fees.*

- Canadian Council on Learning (2006)

*Adult learners who want to study at university know that they are capable, but in some ways don't feel worthy of the academy. Doubts about ability, about being able to figure things out, about being able to complete their chosen program, are common....Adult learners are somewhat anxious learners not only because they are concerned about their own ability per se, but also because they are fearful of being left in the dust by eighteen year old students who are fresh from high school English and sciences.*

- Tabin, 2007

The training literature contains a fair amount of commentary about structural barriers, such as lack of awareness among the less educated and insufficient support from employers and governmental unemployment policies. Institutional barriers are discussed sometimes in the context of adult and continuing education programs and pedagogy, but less frequently in the context of undergraduate credit programs. Nevertheless, some other institutional barriers, such as insufficient academic advising, are occasionally examined:

*The choice and variety available to students at comprehensive colleges and universities are not effective if students are not provided adequate help to navigate that complexity and make informed choices.*

- Bailey et al, 2003

Rather than being placed in a theoretical framework, the following list of barriers from Statistics Canada illustrates the manner in which barriers are frequently simply enumerated:

*Top reasons (in rank order) for unmet work-related training needs or wants:*

- 1. Training too expensive/ could not afford it (note: this study includes workshops courses provided by private trainers and cost-recovery continuing education courses at public institutions)*
- 2. Too busy*
- 3. Schedule conflicts*
- 4. Family responsibilities*
- 5. Instruction offered at inconvenient times*

- Statistics Canada, 2003

Inadequate basic skills may be viewed as a barrier to further learning, but it will be treated here as a special category of adult learning.

## **Basic Skills and Preparatory Learning**

The Canadian Council on Learning (2003) emphasizes the importance of literacy skills, arguing that they are the foundation for further learning and a key factor in motivating adults to learn. Addressing basic learning needs has a snowball effect in that “learning begets learning.” The

Organization for Economic Cooperation and Development (2002) found that individuals at the highest level of literacy (levels 4/5) are about seven times more likely to participate in adult education training as those at the lowest level (level 1).

*The number of Canadian adults needing learning at pre-college level is huge. The Adult Literacy and Life Skills Survey found on the prose and document literacy scales, 42% of Canadian adults performed below the minimum considered necessary to succeed in today's economy and society. 55% were below the minimum on the numeracy scale. Some of these inadequately prepared individuals are immigrants with language barriers or the cultural knowledge to effectively apply previously acquired learning and skills in a new environment.*

- Canadian Council on Learning, 2007

The view seems to be emerging that simply routing under-prepared students into decontextualized literacy or numeracy courses is less effective and less motivating than courses which combine subject content with basic skill training.

*The past academic histories of adult learners are often characterized by avoiding courses they didn't like or were not good at. They realize now the importance of those courses, "but want to know that support will be available to them as they move into unfamiliar and sometimes frightening academic terrain."*

- Tabin, 2007

Fundamental deficiencies are quite distinct from brush-up needs and the filling of specific gaps in subject matter knowledge.

*"One explanation for the finding that older students were less negatively affected by enrolling in remedial courses is that many of these students, having been out of school for longer periods of time, may merely have had basic skills that were 'rusty' rather than seriously deficient. Therefore, colleges should consider offering short 'brush up' workshops or tutorials instead of semester-long courses to older students who place into remedial courses but who do not have serious skill deficiencies.*

- Calacagno et al, 2006

## **Persistence**

As described earlier in non-traditional pathways, it may be one thing for an adult to complete a single course but quite a different thing for the student to complete a coherent program of courses. Thus institutions need attend not only to recruiting adult students but also to retaining them.

*Whereas employers are almost as important a motivator as individual incentive in generating [individual] course registrations, pursuit of longer studies is mainly based on personal initiative.*

- Organization for Economic Cooperation and Development, 2002

Many adults need to secure jobs quickly and cannot afford long-term enrolment. Their studies become intermittent. Older students are more affected by:

*...the need to balance work and family with school, and that these external pressures outweigh the benefits of social integration. Thus colleges need to help mitigate the effects of the external pressures on older students through flexible scheduling, evening and weekend courses, childcare, distance learning and other means. Colleges should also consider offering accelerated programs and financial support to enable older students to attend full-time and thus shorten the time it takes to reach the key milestones on the way to degrees and further education.*

- Calacagno et al, 2006

A 2004 study of distance education students by the BC Open University found barriers to student completing courses that reflect the situation of adult students generally:

- time and energy management
- unexpected life events
- lack of motivation and discipline
- isolation from other students and instructors
- poor interactions with instructors

Other less significant problems included:

- course content that did not interest the students
- course format that did not “work” for the student
- excessive workload
- sharing resources with other household members
- sole motivation for taking the course disappeared.

This research suggested instructor interaction, or more generally, the students’ perceived lack of institutional interest in their success, should be added to the other groups of persistence barriers (i.e. student characteristics, life circumstances, student motivation, pacing and isolation).

Because there is no “typical” adult learners, one of the more fruitful ways of categorizing adult students might be in terms of their risk of failure:

*Adult learners in the highest risk categories demonstrate four primary categories of need: first, they need guides and mentors’ second, they need financial aid....third, they need a peer community; and fourth, they need a guided and specific academic plan.*

- Pusser et al, 2007

A strong theme in the higher education literature is the important contribution of academic and social integration, or what is sometimes called “engagement”, makes to student success and persistence. This theme is also evident in the adult education literature:

*Adult learners want the experience of getting to know others as part of a community of learners, even though they may not be part of a cohort group. They don’t mind if there are younger learners – in fact, they favour a mix of ages – but they don’t want to be the only older learner. (Part of this is because they are somewhat anxious learners, concerned about their own ability.) They look for supportive instructors who will “help them get through the tough stuff”, understanding instructors regarding lifestyle*

*needs/demands and flexibility, and respectful instructors who value the knowledge and experiences the adult learner can bring to the classroom.*

*- Tabin, 2007*

## **Retirees**

The American Council on Education's first report in its two-year research project on adults age 55 to 79 arises from the observation that:

*...the term retirement is being retired, or at least redefined. Instead, increasing numbers of adults age 55 to 79 are entering the third age of life – a stage in recent years defined by personal achievement and learning for self-development – with new plans for their later years in mind...*

*...many older adults – across a wide economic, cultural and educational spectrum – are beginning to articulate new postsecondary education goals, including career retooling, or enrolling in college for the first (or fifth) time to fulfill an unrealized dream.*

*- American Council on Education, 2007*

While postsecondary institutions have long served older adults, whether in integrated or segregated programs, these activities have been small scale and will be inadequate for the sheer number of healthy, active baby boomers on the horizon.

The 55 to 79 age group encompasses a wide span of needs and desires, from obtaining high school equivalency to postgraduate certification. A significant number of early retirees will be interested in a new full or part-time career. They will want to transition quickly, and may want prior learning assessment, accelerated delivery formats, improved career counseling and job placement. There may be opportunities to partner with employers to train and place older adults in high-demand occupations, especially those adults in their fifties. Credential completion may or may not be important.

Along with seeking to “reinvent” themselves and to achieve personal development goals, third age adults have a strong desire for a sense of community and intellectual development. They want peers who share their passions and interests.

Even in retirement, lack of time can be a barrier for such reasons as family responsibilities. Those with low levels of prior formal education and few resources for accessing schooling may not even consider postsecondary education to be an option. Structural barriers include a lack of transportation, a lack of support services and fixed or limited finances. Furthermore, potential students may lack awareness of steps institutions are taking to address these barriers.

## ***Institutional Responses to Adult Learners***

### **Private Institutions**

Information about private postsecondary education is fragmented and scarce, especially in the career-training sector, but the private sector is important in that it competes directly with, and in some cases more successfully than, public institutions in serving adult students. Regardless of the extent to which public institutions might choose to emulate private sector practices, the presence of private institutions is too large to simply be ignored.

Most private institutions in BC are small and for-profit career-training institutions. Across North America, the not-for-profit private institutions are concentrated in the baccalaureate-granting sector. In the industrialized world overall, the Organization for Economic Cooperation and Development concluded in 2002 that private institutions are becoming a more important source of adult learning as they tend to be more flexible and more responsive to employer needs than public institutions.

The for-profit sector seems particularly worth monitoring:

*The for-profit experience has important lessons for community colleges, especially with respect to student services, program flexibility, the use of data for program improvement, curriculum development, and a focus on outcomes...*

*Unlike the haphazard process at many comprehensive public institutions, for-profit institutions concentrate on coordinating student services such as admissions, financial aid, advising, placement assessment and registration to make the entry process convenient.*

- Bailey et al, 2003

*Our findings suggest that most of these for-profit programs extend the market to students who in many cases would otherwise not enroll at all. This finding seems particularly clear with regard to older, adult students who are a mainstay of many of these programs."*

- Breneman, 2005

In terms of curriculum, regionally accredited for-profit institutions in the USA typically offer degrees in (Kinser, 2005):

- business
- computer and other technical fields
- health and psychology

Other fields include:

- office and support staff
- paralegal studies
- criminal justice
- travel and tourism
- education
- culinary arts

By way of a case study, one successful for-profit institution targets students who are at least age 22, have some prior postsecondary experience and who are “low maintenance” in terms of the non-academic support they need. Students enroll in a single course at a time, offered in the late afternoon at a leased location that is convenient for commuters. The course is typically only six weeks long, meeting once a week for four hours and requiring additional group work with two to five other students. A missed class may result in expulsion from the course but a guaranteed seat the next time the course is offered at no additional cost.

All administrative tasks from registration to purchasing textbooks can be completed online. Technical support is available 24/7. Tutorials and refreshers for basic math and writing, as well as reviews of draft student assignments from a writing perspective, are also available online.

## Curriculum

The OECD (cited by the Canadian Council on Learning, 2007) indicates that job-related training adult education dominates adult education. In almost all countries surveyed, job-related training accounted for more than 70% of all education and training courses taken by adults.

A career objective is important for all distance education age groups. An academic orientation is more frequently found in the younger age group, whereas older students are more interested in personal development than academic goals. (Open University, 2007)

Where continuing education offerings include credit-based courses, the top fields in the USA are (Pusser et al, 2007):

- management, business and marketing
- arts, humanities and the social sciences

The top non-credit fields add computer and information technologies to the list.

According to Stokes (2005), colleges and universities must:

*...better align their educational offerings with the needs of employers – those organizations that ultimately employ the students passing through their institutions on the way to a better life. Otherwise, industry will continue to do what it has done for the past two decades: work around higher education by creating its own system for training and development.*

## Delivery Methods

One of the hallmarks of contemporary continuing education is:

*...a diversity of delivery formats and the ability to offer courses at times convenient for the population of nontraditional learners. In the institutions that responded [to a survey], the four most commonly available formats for both credit and noncredit courses were*

*evening courses, weekend courses, summer courses, and online asynchronous instruction.*

*- Pusser et al, 2005*

Older students frequently study part-time and certain populations are quite open to evening and weekend scheduling.

*They are happy to have courses offered in different ways (e.g. face to face, mixed mode, accelerated, short, long) but generally favour those options that minimize the number of times they come to campus – e.g. spending longer while on campus, but going there fewer times.*

*- Tabin, 2007*

The University of Illinois system is establishing an online “Global Campus Initiative”. A new term begins every two months and classes are taught over a period of seven weeks so that each program will enroll six cohorts of students per year.

## **Distance and Online Learning**

Online education is growing rapidly and, according to the University of Illinois, soon one in five students in American postsecondary education will be taking at least one online class. The University says that students report that they know more of their classmates, and know them better, online than they do in face-to-face settings.

The Open University (2007) found that students report valuing the flexibility of distance education, e.g. self-paced and accessible. They are a little less positive about course mechanics, e.g. support material. Perceptions are mixed about contact with instructors and its efficacy, and about learner independence and motivation – the price for flexibility is a greater need for self-discipline.

Stokes (2005) argues that:

*We are just at the start of a major change in how education is delivered. Yet significant portions of the academy remain bogged down in debates over the rigor of online learning and the true costs of delivering education online. Issues of quality are of course critical, whether a course is delivered online or in a classroom. There have been poor online courses just as there have been poor classroom-based courses.*

*But for some within the academy these arguments are merely excuses for maintaining the status quo and avoiding change at virtually any cost. To some extent, these debates have the character of a disinformation campaign....*

*The good/bad dichotomy regarding online education tends not be useful because there is no clear evidence that online education is effective in certain situations. The more productive approach is to ask what the appropriate blend of online and face-to-face delivery is for different students and different situations. Online learning represents a powerful opportunity, making it possible for adult learners to more effectively incorporate learning into their busy lives.*

## Student Services

Tabin (2007) reports that adults expect the application and registration process to be easy and clear, and that there will be spaces for them in the courses (no waiting or competing for seats.) They expect easy access to library and course materials and don't want to have to come to campus to do everything or to wait in long lines. They look for available, knowledgeable and reliable academic advising.

Tabin also notes that adult learners want to know that there are staff they can get to know by name (and in person, possibly) whom they can contact in the program when they need help or have questions.

The University of Illinois' Global Campus Initiative will provide:

*Access to expanded library collections, multi-lingual services, some services provided 24/7, rapid turnaround on admissions and financial aid applications, online payment and transcript services are all needed.*

A number of writers call for improvements in student services. For example:

*In addition, since customer service is notoriously lacking at public...colleges, coordinating student services and counseling and improving institutional research to enable data-driven decision-making are clearly areas that need intensive development.*

*- Bailey et al, 2003*

Other problems include a lack of awareness and information about existing opportunities, and web-based information presented in "needlessly complex ways." (Canadian Council on Learning, 2007)

## Conclusions

Adults are a difficult clientele for postsecondary institutions to serve in that they are heterogeneous and what is appropriate for one subpopulation is not always best for another one. Institutional collaboration and specialization may be a means for customizing services to particular adult groups and still achieve critical masses.

The adult education literature seems to say more about how to instruct adults than what their curricular needs might be. In order to fill this gap, there may be a great deal to be learned from the practical experiences of continuing education personnel.

Time constraints are central to understanding adult learners' barriers and behaviours:

*Time is a theme that comes up over and over with adult learners. They have full and busy lives, with many demands on their time, and they want services to be efficient. They value their time and don't want to waste it.*

*- Tabin, 2007*

As a result of their time and life constraints, adults value flexibility and variety in delivery systems and the ability to choose what type of schedule best fits their circumstances. Recommendations such as providing more part-time, evening and weekend course offerings, and providing flexible course loads and time to complete the program, are common. Illustrative of these recommendations are:

- offer multiple and flexible class schedules, and a variety of pedagogies (Lumina Foundation, 2007)
- create year-round, accelerated and convenient programming (Pusser et al, 2007)
- help with developing time management skills (Open University, 2007)
- locate courses close to where students live or work, perhaps in collaboration with community partners (Lumina Foundation, 2007)

While the overwhelming curricular message is that adults' decision to return to extended periods of study is often based on pragmatic considerations, typically related to jobs and careers, this message is tempered by the observation that learners are not especially interested in the long run in rote learning and narrow training.

Pusser et al (2007) suggest the need for both applied and liberal education can partially be met through developing pre-baccalaureate, career-oriented programs that incorporate academic credit that can eventually be counted towards a degree. Other authors focus simply on utilitarian purposes, making recommendations such as attending to shortage occupations or meeting the needs of particular industries and occupations by customizing skill assessment tools and curriculum.

Some, but by no means all, writers emphasize that basic skills and literacy training is a large need, especially if English as a Second Language and other immigrant needs are taken into account. Under-prepared students, whether suffering fundamental deficiencies or specific gaps and rusty skill sets, require intentional academic assistance from institutions.

Given the targeted and intermittent nature of adult enrolment patterns – learning that often comes part-time in multiple venues – adults value user-friendly methods of prior learning assessment and recognition that enable them to accumulate their “chunks” of learning into a coherent pattern. “User-friendly” includes effective academic advising, counseling and educational planning. Program publicity should, to the extent feasible, help prospective students with a variety of backgrounds and life situations figure out the most effective way to navigate to their educational goal.

Some adult learners are needy and high maintenance, while others are quite independent and self sufficient. Both groups, however, value the personal touch, whether provided face-to-face or mediated through technology. Friendly and efficient student services are expected.

Positive, proactive and personalized interaction with instructors is valued. (“It feels better to know you have people behind you, cheering you on.”) (Open University, 2007). This instructional support should include:

- timely, helpful feedback on assignments
- clarification of performance standards
- accessible, responsive instructors
- increased student interaction with peers and instructors (perhaps using technology to create opportunities for connection.)

Finally, the literature suggests public institutions should pay more attention to their private sector competition, especially to learn how the private sector is succeeding in attracting students that public institutions do not attract. The recommendation seems to be that in terms of services, public institutions would do well to take private institutional practices as comparators. In terms of instruction and curriculum, the literature is less quick to recommend copying the private sector. It does, however, suggest public institutions think seriously about the merits of alternative delivery systems and the extent to which employer perspectives enter curricular decision making.

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