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ABSTRACT Three papers discuss the needs, interests, and participation of adults in learning activities. Generally, the papers deal with influences upon the possible demand for lifelong learning in the future. In the first paper K. Patricia Cross synthesizes findings from thirty-one state and national studies concerning the patterns of participation and interests of adults in further education. She examines participation rates by subgroups and by certain demographic variables: age, race, sex, educational attainment, and region. Obstacles (situational, dispositional, and institutional barriers) to participation in organized learning activities are also discussed. In the second paper Kjell Rubenson explores participation in recurrent education (education following basic education completion or discontinuation) and the problems of the undereducated and underprivileged. He provides a paradigm of recurrent education recruitment and presents findings about motives for and impediments to recurrent education participation. Also, he points out the influences of self-evaluation and the value of member and reference groups. In closing, Rubenson discusses program possibilities in terms of curriculum, information, and finance. In the final paper James Broschart presents a conference review. He emphasizes two important areas of concern addressed at the conference: assessing learning needs and designing research to assess learning needs. In addition, he identifies various emerging lifelong learning issues. (CSS)

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CONFERENCE REPORT: ADULT LEARNING NEEDS AND THE DEMAND FOR LIFELONG LEARNING

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INTRODUCTION

Charles B. Stalford, National Institute of Education

The three papers in this volume discuss the needs, interests and participation of adults in learning activities. They are the product of a 1977 NIE project designed to advance the discourse among those interested in public policy issues surrounding the much-discussed concept of lifelong learning.

In general, the papers deal with influences upon the possible demand for lifelong learning in the future i.e., "who will participate?", rather than issues of how to supply services in response to that demand.

Current interest in lifelong learning reflects an increased amount of attention being focused by many upon the learning activities of adults. Several forces might be seen behind this attention. One is the experience of a number of countries in Western Europe, notably in Scandinavia, with "recurrent education" schemes, in which the life-span learning interests of adults and the continuing interrelationships between education and work are emphasized.

A second influence in this country—but not unique here—is the passage of the post World War II "baby boom" populations into adulthood and the emerging effects of subsequently declining birth rates. This has resulted in an increase in the average age of the American population, a correspondingly greater pool of adults who might be involved in learning activities and a decrease in traditional school-age populations.

Numerous other factors might be seen as influencing the rise of interest in lifelong learning. These include increasing attention being directed to uses of leisure time and a search for ways to change or otherwise cope with the deadening character of

worklife seen to exist for many Americans in our industrial society.

A significant manifestation of emerging American interests in lifelong learning occurred with enactment into law of the "lifelong learning" provisions of the Higher Education Amendments of 1976 (Title IB, Public Law 94-482). This legislation, colloquially referred to as the "Mondale Bill", in recognition of its support by Walter Mondale, then Chairman of the Senate Select Subcommittee on Education, states in part:

"(1) accelerating social and technological changes have had impact on the duration and quality of life;

"(2) the American people need lifelong learning to enable them to adjust to social, technological, political and economic changes;

"(3) lifelong learning has a role in developing the potential of all persons including improvement of their skills, and preparing them to participate in the civic, cultural, and political life of the Nation;

"(4) lifelong learning is important in meeting the needs of the growing number of older and retired persons; . . .

"(8) American society should have as a goal the availability of appropriate opportunities for lifelong learning for all its citizens without regard to restrictions of previous education or training, sex, age, handicapping condition, social or ethnic background, or economic circumstance."

The philosophical position in support of lifelong learning was well stated elsewhere by Mr. Mondale as follows:

"What these programs and the people involved in them have in common is that they all believe that education is something that can take place outside of school and in the minds of those older than 21; that the process continues throughout one's life; and that as we increasingly encounter changing career and social demands, we must shape education to help us meet them." (*Change Magazine*, October 1976)

This volume consists of two papers prepared as resources for an invitational conference on adult learning needs and the future demand for lifelong learning sponsored by NIE and a paper describing the conference proceedings themselves.

The specific purposes of the conference were to form some estimates of the extent and nature of the possible demand for lifelong learning in this country in the future and to suggest needed research on this topic. Some 30 researchers, administrators and policymakers, reflecting diverse interests and points of view, attended the two day conference, which was held in Reston, Virginia, on September 26-28, 1977.

The two pre-conference papers are presented first in this volume, followed by the synopsis of the conference proceedings. While the two pre-conference papers were technically resources to the conference and might therefore be listed herein as appendices, they are descriptive enough in their own right to warrant separate attention.

Dr. K. Patricia Cross, Senior Psychologist with the Educational Testing Service, was asked in her pre-conference paper to summarize existing knowledge about the actual participation of adults in learning activities, plus the extent and nature of potential adult interests in learning.

Information about the number of potential or "would be" learners as discussed by Dr. Cross is based principally upon interests expressed by adults about learning activities in response to survey questions such as "would you be interested in some form of further learning beyond high school within the next two years?" The number of "would be" learners thus constitutes a potential measure of demand for learning services in excess of those levels presently being experienced.

The extent to which the number of "would be" learners exceeds the number of actual participants in learning, as described in Dr. Cross' paper and the degree to which adults in the former group are

expressing actual intent to participate in learning activities, as opposed to somewhat wishful thinking, appear to be significant policy issues regarding the future demand for lifelong learning.

A second important issue when discussing public policy related to the demand for lifelong learning is the myriad of meanings which might be attached to the term "learning." At one extreme, only formal learning programs conducted in schools or school-like settings i.e., "education" programs, would be of interest. At the opposite extreme, almost all learning, including spontaneous and informal learning, as well as preplanned and institutionalized learning, would be considered germane to public policy discussions.

The lifelong learning legislation embodies a rather broad view of learning:

"learning takes place through formal and informal instruction, through educational programs conducted by public and private educational and other institutions and organizations, through independent study, and through the efforts of business, industry, and labor" (Title IB, Section 131(5))

Dr. Cross notes distinctions between more and less formal kinds of learning activities when discussing the participation rates of adults. On the more formal side, there are participation rates when "an organized learning activity" or "the receipt of instruction" is involved ("between 12 and 30%). Conversely, there are participation rates when "a sustained, highly deliberate effort to learn" is involved (98%). The very discrepant estimates of adult participation noted by Dr. Cross, depending upon which notion of learning is operating, warrant a brief elaboration here.

The "self-sustained, highly deliberate effort" notion of learning was first highlighted by Dr. Allen Tough in 1971. This learning is frequently referred to, not entirely accurately, as "self-planned" learning. Its most distinguishing characteristics are not necessarily the "sustained, highly deliberate" nature of the learning effort as much the circumstances under which the learning is undertaken. Thus, "self-planned" learning projects typically are undertaken alone, outside the institutional framework of schooling and may cover a wide, virtually limitless range of topics. Examples of such topics include learning how to play golf or bridge, how to increase one's skills in raising children and learning how to buy an appliance. But self-planned learning may also be undertaken in academic and occupationally-related subjects as well.

A common theme in all self-planned efforts is on learning for some practical use or purpose.¹

The fundamental requirement for a "self-planned" adult learning project to have been of interest to Tough was that it added up to at least seven hours during a one year period and have clearly reflected motivation on the part of the learner to retain a "certain fairly clear knowledge or skill, or to produce some other lasting change in himself" (Tough, 1971, p. 6).

The issue of potential versus actual adult participation, suggested previously in this introduction to be important, may become somewhat moot when "self-planned" learning is involved. A series of subsequent research studies based on the Tough model have generally shown the participation rates of adults in "self-planned" learning activities to be at or near 100% of those surveyed.

Dr. Patricia Coolican reflected on the participation rates discovered in adult "self-planned" learning projects as follows:

"It appears the major question is no longer participation vs. non-participation. Almost everyone undertakes learning projects to some degree. The major focus now should be on questions related to differences in degree of participation, the issue of difference in quality, and how to make this learning better." (1974, p. 13).

The point suggested here is that existing estimates of adult rates in learning activities do not fall along an unbroken continuum beginning at 12% and ending near 100%. There is a gap between the upper bound of estimates for activities involving "formalized learning", or receipt of instruction,--30% of adults--and most estimates of participation rates in self-planned learning, which usually near 100% of adults.²

¹ Tough (1977) refers to "major learning efforts."

² Most of the studies of self-planned learning have not been based on probabilistically drawn samples, which would permit generalization of findings to larger populations, e.g., at state and national levels. The most notable exception is a study by Penland based on a nationally representative sample of 1,500 adults conducted by a public opinion polling firm. In that study, 79% of adults interviewed reported participation in self-planned learning efforts. (See Tough, 1977, for details.) The discrepancy between this figure and the higher rates found elsewhere is not immediately explainable. Dr. Tough believes it may be due to methodological differences between the Penland and other studies, specifically shorter and possibly less probing interviews conducted by the public opinion firm.

The different types of learning activities referred to--formal and self-planned--may therefore be distinct and noncomparable for public-policy purposes of estimating the demand for lifelong learning. The distinction does not necessarily lie along content lines; an increasingly wide spectrum of subjects are taught nowadays in formal or "instructed" activities, through diverse channels, including continuing education divisions of universities, community groups and libraries.

The public policy implications however, center more on the structures and processes appropriate for meeting the various kinds of demand. In the case of formal or instructed learning, for example, considerations of how to assist numerous kinds of institutions and organizations arise. In the case of self-planned learning, a rather different and largely uncharted set of conditions arise, involving how to facilitate individual learning efforts undertaken in or near home settings, without the formal appertunances of schooling, such as curriculum and instructors--and how to do so on a large scale. (For further discussion of this point see Coolican, 1974, p. 21. See also Ziegler, 1977).

Before leaving this topic, one caveat regarding the distinctions highlighted between formal and self-planned learning is in order.

Methodologically, confusion may have existed in the minds of respondents about the kinds of learning of interest to survey researchers who posed questions such as "would you be interested in some further form of learning beyond high school within the next two years?" Some, perhaps most, saw only formal, i.e., "school-like" activities, to be learning and hence of interest to the researchers. Others might have considered in their response a broader set of activities akin to those in "self-planned" learning.

Further refinement of research techniques; for example, greater use of in-depth interviews, might help clarify the characteristics of all kinds of adult learning in the aggregate. It might also clarify whether there is actually a "middle ground" of adult learning activities for which participation rates would fall between the rather polarized estimates of participation for formal vs. self-planned learning now in existence. Workshops and seminars at the workplace, or short courses in subjects such as first aid and community projects might represent such a "middle ground." (Dr. Cross believes the dichotomy seen here between the two types of learning may gradually be withering away in the face of increasingly varied

adult learning activities occurring in "formalized settings").

Dr. Kjell Rubenson, Associate Professor at the Stockholm Institute of Education, was asked to write about factors affecting the participation of the "undereducated and underprivileged" in adult learning activities. The relatively low participation rate of such groups in adult learning activities constitutes an issue deserving further consideration when expanded participation of lifelong learning is envisioned.

Two issues might be highlighted here. The first is to find the most useful ways to describe subpopulations with low participation rates in learning. One might characterize such subpopulations by general ethnic, minority, or other demographic characteristics. Dr. Cross, however, argues that other specific attributes are in fact more important predictors of participation, principally previous educational attainment. (The two sets of attributes are not, of course, wholly independent.)

Dr. Rubenson's paper incorporates a broad view of the subpopulations to be focused upon which seems to encompass both views. He equates "underprivileged" groups with "educationally weakest groups." While "underprivileged" is a term which some might feel is unnecessarily value-laden, as well as insufficiently descriptive, "educationally weakest" is a relatively straightforward empirical description which may be useful for focusing public policy issues.

The second issue is partially related to the first and deals with the kinds of adult learning, i.e., formalized versus "self-planned" as previously discussed, for which "underparticipation" of the "educationally weakest" subpopulations might be seen as a problem.

The scope of Dr. Rubenson's paper embraces "all education embarked on by the individual after previously completing or discontinuing basic education, usually after an intervening period of job experience". The phrase "organized learning" is introduced, which in addition to formal schooling, refers to a variety of organized activities in numerous subjects, both practical and non-practical. Swedish "study circles" are among the most heterogeneous and loosely structured type of organized learning activities cited. Dr. Rubenson does not however, include self-planned learning, as described by Tough, in the preview of his discussion and in fact regards it skeptically, to wit: "The idealistic appearance which often surrounds lifelong learning easily conceals the fact that the process of informal learning is not always positive and developing".

No position is implied here on the appropriateness or value of "formalized," or "organized" versus "self-planned" learning. It is only noted that Dr. Rubenson's paper on "underparticipation" is particularly oriented towards organized learning activities. (Variation in the extent and duration of participation by specific subpopulations, e.g., the less educated, in self-planned learning is observable, but "nonparticipation" by such groups has not been an issue in discussions on self-planned learning to the extent that it is in discussions of "formalized learning.")

In part, Dr. Rubenson's orientation is congruent with identifiably European, particularly Scandinavian, concepts of "recurrent education," in which stress is placed upon greater interspersed education with work throughout one's life cycle and closer relationships between the institutionalized structures of education and work. A relatively greater emphasis is placed therein upon work-related and collective determinants of behavior. Thus, for example, Dr. Rubenson discusses effects upon participation in learning activities, of changes in the individual's work environment, of values of "member and reference groups" and organized methods of recruitment.

More importantly, "recurrent education" in the Scandinavian conceptualization is a politicized phenomenon in which broad societal goals to be accomplished through intensified adult education programs have been made explicit. For example, an Organization for Economic Cooperation and Development (OECD) paper says about the new Norwegian Adult Education Act of 1971:

"The bill, which was formally tabulated by the Ministry of Church and Education, was based upon the general political objectives of the government, and also upon its specific objectives in educational policy . . .

The Norwegian Government's major political objective in the sphere of the transformation of society is the achievement of a higher degree of equality and democratization. Together with other political measures, the law on adult education will become an instrument towards increased equality between individuals and groups, between men and women, between handicapped persons and the rest and finally in the regional distribution of resources." (Dalin, 1977, p.1).

To the extent that the movement towards more adult education and learning in America is spurred by political considerations of achieving greater equality

among population groups, a corresponding emphasis is likely to be placed in policy discussions upon demographic descriptors of those in need of greater services. To the extent political considerations are not seen to be foremost, more diverse, less doctrinaire methods of describing potential learners may be evident.

This is not to say that demographic data would suffice for planning educational programs. Dr. Cross, for example, notes:

"Women entering the job market, career women, women fully occupied with home and family are groups that should not be lumped together under the statistically convenient, but educationally irrelevant, category of "women" if we hope to plan sensitive educational responses for a diversity of needs and interests."

Neither is it to claim that equality has to date been easily brought about by adult education measures, as Dr. Rubenson points out. It is to say that in the American context the kinds of learning for which underparticipation is important and how best to describe the "underparticipants" are public policy issues whose treatment will likely depend in part upon further clarification of the political and societal goals which the advocates of lifelong learning see the concept to be serving.

In the future, therefore, one might hope for further clarification of the relative extent to which lifelong learning will be seen in this country as a collective, as opposed to individually-oriented movement and the extent to which it is politically as opposed to nonpolitically oriented. Insofar as questions of social equity are concerned.

Notes about the Conference

Dr. James Broschart's paper describes the substance of discussions at the conference. As noted earlier, a diverse group of 30 persons attended. Fourteen of the attendees were practicing researchers, 5 of whom would most likely not have identified themselves primarily with educational research. Educational administrators, representatives of specific population groups (unions and the aging) and representatives of various public agencies and interested private organizations were among the other attendees. (A list of attendees is shown in the Appendix).

The interpersonal dynamics of the conference were marked by a good deal of frustration. In part, this was due to confusion and disagreement among the participants over procedural points (e.g., which

part, if any, of the agenda to address, what the conference objectives were) as well as controversy over substantive issues.

An additional contributor to the general frustration experienced was probably the diverse nature of the group. Not only did researchers and non-researchers experience difficulty talking to each other, but those researchers not ordinarily engaged in educational matters found it difficult to find common grounds for discussion with those who were. Apart from the influence of difficulties which might be traced to shortcomings in the planned group processes, the difficulties also reflect those often encountered when "interdisciplinary" discussions are undertaken.

A Dr. Broschart notes in his paper, lifelong learning is an elusive as well as an interesting concept. One of the continuing themes of the conference was an attempt by one or more of the participants to clarify or define the concept of lifelong learning sufficiently so that discourse on a selected topic could go forward.

The preceding comments are largely a clarification about the nature of Dr. Broschart's paper for the reader. It is a "distillate" in a near-literal sense, in that the condensed thoughts from the conference are captured, but without a description of the frequently difficult processes by which they were generated.

Distillates may have significant clarifying value, however; the decision to publish these conference proceedings was consciously made, notwithstanding the foregoing factors, because numerous highly significant issues have been raised therein. Among the issues are: how priorities are to be established for lifelong learning needs; the place, if any, of lifelong learning as a tool for redressing social inequities; relationships between lifelong learning and compulsory schooling; how to incorporate social psychological knowledge about adult "life stages" into societal planning for lifelong learning and the need to explore the various structural arrangements which might be established to implement lifelong learning services.

Dr. Broschart's paper is therefore offered as a service in order to stimulate discussion of demand-related lifelong learning issues. Rather than providing succinct estimates of the future demand for lifelong learning, the conference proceedings may usefully suggest appropriate factors in need of further consideration. For example, the scope and boundaries of lifelong learning presumed to be relevant should be

specified prior to undertaking estimates of its demands.

In addition, thought should be given to the most appropriate level of analysis for estimating lifelong learning demand. Should it be on the national level, or at more targetted levels, i.e., upon populations in specific types of geographic, social-economic, racial-ethnic, cultural or other categories?

Finally, assessing research on lifelong learning generally as well as its demand specifically, will require considerable dexterity in integrating information from highly varied sources. To illustrate, the existing sources of research data potentially applicable to lifelong learning range from broad-gauged survey research, representative of large segments of the population, to finely-grained micro studies of individual human development. This diversity of styles and their practitioners is not brought together easily, if at all, in the service of producing an integrated research perspective on lifelong learning.

One procedural objective of the conference was to facilitate an integration of views about lifelong learning between researchers and others with diverse styles and interests. This objective was not achieved as planned, but if lifelong learning is to be successful, the need for such integration will ultimately have to be met.

The National Institute of Education is pleased to make these papers, representing the views of a distinguished group of individuals, publicly available. Comments on the issues raised herein may be

directed, to Charles B. Stalford, National Institute of Education, 1200 19th Street, N.W., Washington, D.C. 20208.

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A CRITICAL REVIEW OF STATE AND NATIONAL STUDIES OF THE NEEDS AND INTERESTS OF ADULT LEARNERS¹

K. Patricia Cross, Educational Testing Service

Within the past five years, more than 30 major studies have been issued concerning the participation and interests of adults in further education. Most of the studies survey a sample of adults in a defined area, asking via field or telephone interviews, about interests, plans, perceived barriers, past learning experiences and the like. The sponsors of the studies are frequently state agencies with some responsibility for long-range planning in education, and the reports are expected to serve as planning documents.

The reports provide an unusual opportunity for researchers and policy makers to assess the state of knowledge with respect to what is known about the educational needs of adults. But they also provide an excellent opportunity to evaluate our progress in designing studies that will provide useful information. The existing studies are similar enough to permit some generalizations across studies, yet different enough to provide some breadth of perspective.

The purpose of this paper is to present findings from a synthesis of state and national studies and to point to some of the questions and issues raised by the nature of the reports themselves.

Addressing the Demand for Adult Learning Opportunities

Although many people assume that it should be possible to arrive at some kind of "demand" figure

purporting to show how many adults would continue their education if the conditions and price were right, it is virtually impossible to offer such a figure with any confidence. Not only do we not know what the future "demand" will be, we do not even have very reliable figures as to what present use is. If participation is defined as learning through an "organized learning activity," or "the receipt of instruction," surveys show that somewhere between 12 and 30 percent of the adults who are not full-time students in high school or college may be adult part-time learners (NCES, 1975; Carp, Peterson and Roelfs, 1974). If, however, participation is defined as "A sustained, highly deliberate effort to learn," then one study concludes that 98 percent of the adults are participants in adult learning activities (Tough, 1971). Obviously, a participation rate varying between 12 percent and 98 percent is not very useful for planning purposes.

Predicting the demand is even more difficult and precarious. To a general question such as, "Is there anything in particular you would like to know more about or would like to know how to do better," affirmative responses run as high as 77 percent (Carp, Peterson, and Roelfs, 1974). To a more specific question such as, "Within the next two years would you like to engage in some form of further learning beyond high school . . .," affirmative responses vary from 36 percent in Iowa to 59 percent in California.

For the nation as a whole, a reasonable estimate is that somewhere around one-third of the adults are probably participating in some form of organized learning activity and that somewhere between

¹Prepared for an NIE Invitational Conference, Reston, Virginia, September 26-28, 1977.

one-third and two-thirds say that they are seriously interested in further learning of some kind.

Actually, we know a lot more about *patterns* of participation and interest than we do about numbers. There is remarkable consistency across the 31 major recent studies listed in the appendix as to who is interested in further education and reasonably good agreement on what kinds of programs and services they say they want. Some of the problems in being too literal about using survey responses for planning purposes, however, are discussed on pages 21-26.

Almost everyone agrees that the demand for part-time learning opportunities has increased dramatically in recent years, but there are some who warn that the rate of adult participation is slowing down now and that future rates of increase will be even slower as the post-World War II baby bulge passes through the early adult years (O'Keefe, 1977). The best figures available on trends in adult participation are those from the NCES Triennial Surveys which are as follows:

	Eligible Adult Population (Thousands)	Participants In Adult Education (Thousands)	Participation Rate (per cent)
1957 ¹	108,363	8,270	7.6
1969	130,251	13,041	10.0
1972	138,865	15,734	11.3
1975	146,602	17,059	11.6

¹The 1957 figure is from Wann and Woodward. 1959 and is not completely comparable to the Triennial Survey data of 1969, 1972, and 1975, but it is the best figure we can provide for data prior to the Triennial Surveys.

The numbers of participants represented by the above figures are generally conceded to underestimate the extent of adult learning activity, but the general trend has not been questioned—perhaps because there are no competing data. Between 1969 and 1972, there was a 20.7 percent increase in adult learners with a 6.6 percent increase of their numbers in the population. Between 1972 and 1975, however, the adult population grew by 5.4 percent while their participation in organized learning activities increased by only 8.4 percent. While these data have led some analysts (O'Keefe, 1977) to conclude that the boom in adult education may already have peaked, it is also true that the opportunities for adult learners are

increasing at an unprecedented rate—at least in the offerings of colleges and universities which supply about 40 percent of the “organized learning opportunities” for adult part-time learners. In 1967-68, 1,102 colleges and universities reported offering adult and continuing education; by 1975-76, the figure had doubled, rising to 2,225 institutions (Kemp, 1978). Since there is plenty of research to show that increased opportunity spirals into increased demand, any solid predictions about the probable future of adult education seem risky.

Despite the many areas of uncertainty, especially with respect to “demand” figures, there is much to be learned from the available data. This paper attempts to present some highly distilled descriptions of various subpopulations of adult learners. Supporting data and documentation may be found, along with qualifications and exceptions to the generalizations made here, in Cross and Zussman (1978) and in Cross (1978). The purpose here is to paint the broad picture that is emerging from the vast amount of activity that is represented in the descriptive studies of the past five years.

Participation Rates by Subgroups

Table 1 shows the participation rate in “organized instruction” for adults 17 and older who are not full-time students in high school or college. Data are from the 1975 NCES Triennial Survey which showed that 11.6 percent of the adults were participants in organized learning activities. To highlight groups that are underrepresented in adult education, those with a participation rate of 11.0 or less are underlined.

The message is quite clear that adult education is serving the advantaged classes out of proportion to their numbers in the population. The underlined categories in Table 1 reveal that blacks, the elderly, those with part-time jobs, low incomes, and low educational attainment are underrepresented as far as participation is concerned. There are also some interesting regional and population density variations shown in Table 1 which will be discussed later.

In a reanalysis of 1972 NCES data, Froomkin and Wolfson (1977) showed that although the less privileged were underrepresented in the participation statistics, they were not necessarily underserved as far as resources go. Froomkin and Wolfson contend that when education is measured in terms of “total contracted hours,” the lower classes sign up for as much education as the upper classes do. Thus, whereas the privileged classes account for a larger

TABLE 1

Participation Rate in Adult Learning in 1975

	Participation Rate ¹		Participation Rate ¹
Age		Income (dollars per year)	
17-24	11.5	<i>Under 3000</i>	4.4
25-34	20.6	3000-4999	5.5
35-44	15.0	5000-5999	7.5
45-54	10.5	6000-7499	9.1
55-64	5.8	7500-9999	11.5
65 and older	2.3	10,000-14,999	12.9
		15,000-24,999	15.8
		25,000 and over	17.7
Race		Hours worked May 11-17, 1975	
Black	6.9	<i>Less than 10</i>	7.2
White	12.1	10-14 hours	8.6
Other ²	13.4	15-34 hours	11.6
		35 or more	15.3
Sex		Region	
Male	11.7	<i>Northeast</i>	10.0
Female	11.6	North Central	11.2
		South	10.4
Educational attainment		West	16.6
<i>Elementary (0-8 years)</i>	2.0	Metropolitan status	
<i>High school (1-3 years)</i>	4.6	In SMSA ³	12.7
High school (4 years)	11.9	Central City	11.0
College (1-3 years)	17.6	Outside central city	14.0
College (4 years)	27.0	Not SMSA	9.4
College (5 or more years)	30.4	Non-farm	9.8
		Farm	6.7

¹ Participation rate is computed from a total population base of 146,602,000 non-institutionalized adults 17 years of age and over. In 1975, the overall participation rate was 11.6 percent. Groups with an 11 percent participation rate or less are underlined.

² The Census Bureau classifies Hispanics as either black or white.

Source: Compiled from NCES data, 1975.

³ Standard Metropolitan Statistical Area (SMSA) is a complex category of population density used in Census Bureau analyses.

number of registrations, they spend fewer hours in organized learning than disadvantaged learners who engage in learning requiring larger chunks of time.

Age

Participation and interest in organized educational activities are clearly related to age. Interest, as well as participation, starts to decline in the 30s and drops off sharply after age 55. Summarizing data across a variety of state and national studies, we can safely

conclude that no more than 5 to 10 percent of those over the age of 55 are currently participating in organized learning activities, and less than one-fourth of these older citizens express any interest in further learning. The reasons given for their disinterest are primarily feelings of being too old, lack of energy, and the difficulties of transporting themselves to the places of learning.

The interests of those older citizens who are interested in further learning, however, are sharply differentiated from those of the majority of adult

learners. As a group, older learners are not interested in credit or formal recognition of any kind. They are participating in educational activities primarily for pleasure, for their own satisfaction, and to meet and be with other people. In the California study, almost half of the potential learners over the age of 60 said that a primary motivation for their participation in learning activities was to meet new people. Yet NCES data show that older learners are overrepresented in most forms of "lonely" learning. They, more than other age groups, use television, radio, and private lessons. These forms of home-delivered education are consistent with the strong priority given convenience of location by older people, but there would appear to be a need for more socially-interactive modes of learning. If there were to be a public policy of encouraging the learning activities of older citizens, it should provide opportunities for socially interactive learning, stressing handicrafts, health, nutrition and other subjects useful to older citizens, offered at convenient locations or through good transportation to adult learning centers.

Ethnic Minorities

It is increasingly doubtful that there is an ethnic minority profile of educational needs and interests, either as a group of "minorities" or separately as blacks, Hispanics, Asians, and so forth. All data show that interests span the full range of offerings from basic literacy education to postgraduate research, and that for all demographic groups, the range of interests is inevitably greater within groups than between them.

Despite the interest of federal and state agencies in equal educational opportunities for ethnic minorities, the data on their participation in adult education are not wholly adequate—possibly because the state samples do not contain sufficient numbers of ethnic minorities to be able to draw reliable conclusions. The best data available on the participation of blacks in adult education activities are found in the NCES Triennial Surveys.² In 1975, 12.1 percent of whites participated in some form of adult education compared to 6.9 percent of blacks. Moreover, the participation of blacks has been declining in recent

²Printed reports for NCES offer data only for white, black, and others. "Other," however contains such diverse ethnic groups that lumping them together seems fruitless for analysis.

years, from 7.8 percent in 1969 to 7.4 percent in 1972 to 6.9 percent in 1975. Participation for whites, on the other hand, increased from 10.2 to 11.7 to 12.1 for the three years of the Triennial Surveys. There is no readily apparent explanation for the trend data of black participation, and it is obviously a topic for further analysis.

If blacks and whites are equated for educational background, there is not much difference in participation rates, especially at the high and low ends of the educational attainment continuum. In 1972 both blacks and whites with less than a high school diploma showed a 4 percent participation rate, and both blacks and whites with a college degree or more, had participation rates of 29 percent. In the middle ranges i.e., high school graduates and those with some college, whites participated at a slightly higher rate than blacks.

It is a consistent finding across studies that blacks are using education for upward job mobility. They express more interest in job-related education than whites, and they rarely show any interest in so-called luxury education, such as hobbies, recreation, education for personal development, and so forth. Given this orientation, it is not surprising that blacks express more interest than whites in formal recognition for their learning (degrees or certificates of learning), and that they participate in familiar and credible forms of learning, tending to do their learning in regular school buildings and through classroom formats.

Although public policy concentrates largely on reducing the cost of education to ethnic minorities, the data are mixed with respect to financial need. For example, while cost is cited as a barrier to continued education more frequently by blacks and Hispanics than by whites in New York, the differences are not very significant in California. And while cost is a problem for Hispanics in New York, Native Americans find it less of a problem than home responsibilities and finding appropriate classes to take. Cost data are hard to interpret because they are confounded with age, sources of reimbursement, type of education desired, and so forth. It would appear, however, that providing financial assistance for education to ethnic minorities and other low income groups is not an adequate answer to their needs. The need is to provide education and credentials that are respected by employers and potential employers and to offer education that has an obvious practical utility for improving living conditions and career satisfaction.

While many have interpreted upwardly striving groups to be conservative with respect to their educational preferences and to be leery of non-traditional forms of education, the data indicate that it is not the non-traditional forms that are in question, but the credibility and prestige of education which, in the case of upwardly striving groups, is desired primarily for extrinsic, as opposed to intrinsic, rewards.

Sex

Nationally, the rate of participation in organized learning activities is about the same for women as for men.³ That equality, however, is a recent phenomenon. In 1969, 9 percent of adult women were participants in adult learning compared with 11.2 percent of the men. By 1975, the figures were 11.6 for women and 11.7 for men, with the greatest closing of the gap taking place among women learners in the 17 to 34 year old age group. In 1969 to 1975, women learners in that age group increased from 12.3 percent to 16.0 percent while male participants dropped from 16.8 percent to 16.0 percent. White women (but not black) in all age groups have shown gains in educational participation over the last six years.

Men are usually designated the appropriate comparison group when describing the needs and interests of women learners and potential learners. This inevitably leads to talking about "sex" differences in needs and interests when what we probably should be talking about is lifestyle differences. There is some evidence, for example, that the needs and interests of employed women differ more from those of full-time housewives than the educational needs and interests of women, as a group, differ from those of men. For the purposes of this description, we will follow the convention of contrasting the characteristics of men and women because that is the way the data are presented in the studies reviewed. This is a good time to make the point, however, that the form in which data are presented has a critical, and frequently unrecognized, impact on conclusions and on eventual policy

³ There is some variation among state studies on this finding ranging from substantially more female participants in Iowa to no difference in Kansas to slightly more men in California. The national figures of NCES cited here, while conservative in terms of numbers, appear to reflect reasonably representative patterns of male/female participation.

making. Since clusters of potential learners with common and sometimes critical learning needs cannot be served unless they are identified by those who set up the tables, it is frequently the individual running the "cross tabs" who unintentionally becomes the determiner of policy.

There is not much in the data on adult women learners and potential learners to reflect what most of us perceive to be rather significant changes in the educational needs and interests of women in recent years. But comprehensive trend data is very rare, and what there is, is difficult to interpret. Presumably the NCES Triennial Surveys could provide trend data for at least the last six years, but the particular presentation format used in the 1975 preliminary tables precludes making observations about trends on any except a few variables such as age and rate of participation. The studies of the national Commission on Non-Traditional Study (Carp, Peterson, and Roelfs, 1974) does indicate an apparent shortage of job-oriented courses for women. Whereas 40 percent of the potential women learners expressed an interest in vocational subjects, only 24 percent of the actual learners were taking vocational courses. There was no gap between the expressed interests and actual participation of men in job-related subjects.

The results of most studies, however, quite consistently reflect traditional stereotypes of male and female roles. Men are more interested in job-related education; women are more interested in cultural enrichment, home and family, and education as an opportunity to meet new people and to get away from daily routine. The barriers for women are typically cost and home responsibilities; for men it is likely to be lack of time, with job responsibilities and home responsibilities both contributing to the time problem. Perhaps the most surprising thing about the data on sex differences is that there were rarely any significant departures from traditional thinking about male/female roles.

The documentation of trend data is an urgent priority in planning for the education of women in these rapidly changing times, but it is equally important to give some attention to the analysis of data in educationally relevant, as opposed to demographic, groupings. Women entering the job market, career women, women fully occupied with home and family are groups that should not be lumped together under the statistically convenient, but educationally irrelevant, category of "women" if we hope to plan sensitive educational responses for a diversity of needs and interests.

Educational Attainment

Of all the descriptors of learners, educational attainment is more closely related to the interests, motivations, and participation of adult learners than any other single characteristic. This observation is incredibly consistent across a wide variety of studies. It is demonstrably true that the more education people have, the more interested they will be in further education, the more they will participate, and probably the more they will demand from state and federal planners.

Shown below are some participation rates of adult part-time learners by educational attainment.

Although the CNS survey found a higher overall rate of participation than NCES, the patterns are similar and show a clear increase in participation rates with increasing educational attainment. The interest expressed by would-be or potential learners follows the same pattern. Furthermore, the hierarchy of participating learners, potential learners, and non-learners (those who express no interest in further education) is highly related to educational attainment, with participating learners being well educated already and non-learners generally having poor education backgrounds.

A understanding of the relationship of participation in continued learning to level of educational attainment is fundamental to policy makers. In this egalitarian age, society is not eager to create policy that will increase the gap between the haves and the

have nots. Yet broadening the opportunities for "voluntary" education permits those with high motivation, high past success, good information networks, and adequate funds to get more and more education, while those already dragging in the educational race fall farther and farther behind.

Broadly speaking there are three hypotheses for the consistent and positive relationship between educational attainment and educational interest. One is that education has done such a good job that the more people experience it the more they like it—either for its intrinsic or extrinsic rewards. A second hypothesis is that those who have been successful in the fairly narrow demands of the educational system stay in it longer and also wish to return to the scene of their earlier success. A third hypothesis is that human beings are basically curious and enjoy learning, but that the haves possess the information and the wherewithal to pursue learning that interests them, whereas the have nots are handicapped and thwarted in attaining what all people basically desire.

Policy emphasizing financial entitlements and community walk-in counseling and information services is predicated on Hypothesis Three. The assumption is that providing the disadvantaged with the money and information to make use of educational opportunities will help to narrow the gap between the haves and the have nots. Attention to orientation, confidence-building, and non-competitive

TABLE 2

Participation Rates by Highest Level of Prior Education

Highest level of prior education	Percent participating	
	CNS 1972	NCES 1975
Elementary school (0-8 years)	10	2.0
High school (1-3 years)	20	4.6
High school graduate (4 years)	31	11.9
College (1-3 years)	48	17.6
College graduate (4 years)	57	27.0
Advanced study		30.4
Average	31	11.6

and competency-based measures of success implies an acceptance of Hypothesis Two, through helping disadvantaged groups see themselves as successful learners. Job qualifications that stress educational credentials, and program evaluations that place a high value on student retention seem more in line with Hypothesis One since such practices would tend to reward the attainment of educational credentials.

Acceptance of the various hypotheses is presently more accidental than conscious and appears based more on belief than on research knowledge. Obviously, the role of educational attainment in stimulating interest and motivation in further learning is a critical area for research, and there are already fragments of data in the literature that could be marshalled in support of the various hypotheses.

Regional Variations

National and state studies of participation and interest in learning show considerable variation by geographical region. Table 1, for example, shows that the rate of participation in the western states is significantly above the national average—16.6 percent compared with 11.6 percent nationally. Furthermore, the West is the only Census Bureau region to show above-average participation rates in *all* categories of population density—cities, suburbs, towns, and rural areas.

The state needs assessments of California and Iowa provide further evidence of real regional differences because these two studies used essentially the same design and interview questions. In California, 59 percent of the respondents said they were interested in further learning beyond high school within the next two years, whereas in Iowa, only 39 percent indicated similar interest.

Disparities in participation and interest are even greater when indices of population density are used. Sparsely populated areas show low participation rates, especially in farm areas where learning participants constitute only 6.7 percent of the eligible population: the comparable figure for the suburbs is 14 percent (See Table 1).

Comparative studies of regional variations are exceptionally rich in their potential for contribution to our understanding of the role of factors such as the educational attainment of the populace, the availability of free-access colleges, and the climate of social acceptance for educational activities in stimulating participation and interest in lifelong learning. Support of comparative regional studies which are designed so as to make comparisons

justified, would help to isolate some of the factors leading to favorable climates for learning.

Knowing what we know about the importance of the role of past educational experiences in stimulating interest in future educational activities, it would appear that in the absence of federal intervention, states and regions with high educational opportunity will increase their lead over states with less educational emphasis. Indeed it is perhaps more than coincidence that the states taking the leadership in studying the issues of increased opportunity for adult learners are the states in which the level of educational attainment is highest. To my knowledge, there are no adult educational needs assessments commissioned by southern states, where the educational attainment of the populace is relatively low. Given its natural head, educational opportunity will increase in the "have" states, adding to growing regional gaps in educational attainment.

These capsule summaries describing the needs and interests of various subpopulations show that the recent rash of needs assessments have raised more policy questions than they have answered. The primary policy issues emerging from demographic groupings of potential learners are related to equal opportunity and to eradicating some of the blatant gaps between educational opportunities for the haves and the have nots.

To summarize quickly, the following observations have been made about the needs of particular subgroups.

- Education for older citizens faces a challenge in providing more opportunities for socially-interactive learning at convenient locations.
- It will probably be more useful to target educational opportunities to groups having common educational goals rather than common demographic characteristics such as race or sex. For minorities striving for upward socioeconomic mobility, there is a need for education with high prestige and credibility in the eyes of potential employers. For women, more useful needs profiles could be developed through goal-oriented groupings such as career women, women entering the labor market, and full-time housewives.
- The strong relationship between past educational attainment and participation in adult learning activities operates to increase the educational gap between the well educated and the poorly

educated. In the absence of public intervention, the haves will increase their educational lead because they have the motivation, the information networks, and the financial wherewithal to participate in learning opportunities of interest to them. Given its natural head, learning opportunities and participation will increase most rapidly in the suburbs and in states with a well-educated citizenry.

Some challenging issues for both policy and further research can be raised by looking at various subgroups of potential learners with the intention of narrowing some of the gaps between the haves and the have nots. But equal opportunity is not the only goal of the lifelong learning movement. There is also a desire to improve the quality of life for all citizens through education. To examine some of the issues in that goal, we shall turn to the data on the barriers to participation in adult learning activities.

Barriers

The obstacles that deter adults from participating in organized learning activities can be classified under three headings—situational, dispositional, and institutional. *Situational barriers* are those arising from one's situation in life at a given time. Lack of time due to job and home responsibilities, for example, deters large numbers of potential learners in the 25 to 45 year old age group. Lack of money is a problem for young people and others of low income. Lack of child care is a problem for young parents; transportation is a situational barrier for isolated and physically handicapped learners.

Dispositional barriers are related to attitudes and self-perceptions about oneself as a learner. Large numbers of older citizens for example, feel that they are too old to learn. Adults with poor educational backgrounds frequently lack interest in further learning or feel that they do not have the ability to learn. *Institutional barriers* include practices and procedures which exclude or discourage working adults from participating in educational activities—inconvenient schedules or locations, full-time fees for part-time study, inappropriate courses of study, etc.

At the present time, situational barriers are mentioned more frequently by survey respondents than either dispositional or institutional barriers. Taken together the cost of education and lack of time lead all other barriers by substantial margins. It is

difficult to give the percentages of people affected by these two situational barriers because of the variety of reporting formats across state studies. As a rough figure, however, we can probably assume that the median percentage of people who find cost an obstacle to further education is around one-third, and it is approximately the same for the barrier of time, with a broad range of 20 to 50 percent.

Lack of time and lack of money, however, are both socially acceptable reasons for not participating in learning activities. Thus in one sense it is not surprising that they should rank as the leading barriers, far more common than more personally demeaning barriers such as lack of interest, lack of confidence, lack of ability, etc. One of the more interesting findings to emerge from the studies of barriers to learning come from the Central New York study (1975) in which respondents were asked to speculate on why other adults of their acquaintance did not participate in educational activities. Lack of interest was a leading barrier attributed to others (26 percent), but less than 2 percent of the respondents were willing to admit that lack of interest deterred their own participation. Cost, on the other hand, was felt to be a problem for respondents (18 percent) more than for their friends (11 percent).

Findings such as these highlight the problems of social desirability responses in some of the survey data. One study that would bring a little more reality to the major policy question of how serious the cost barrier is would be to ask people if they know how much various learning options cost. There is every reason to suspect that many adults who cite cost as a barrier have never investigated the cost of adult education. This suspicion is strengthened by the usually large number of respondents (20 to 40 percent) who fail to provide information about what they would be willing to pay for a course of instruction.

Another problem with taking survey responses with respect to cost at face value is that ability to pay is not necessarily the same as willingness to pay. It looks as though past educational attainment, for example, bears a closer and more consistent relationship to participation in educational activities than does income *per se*. Moreover, it is a common survey finding that women are more likely than men to perceive cost as a barrier to their continued education, despite the fact that there is not much difference in the family incomes of male and female learners or potential learners. This finding may have its roots in societal mores that make many women

feel guilty about spending "family" money for their own educations. Or it may be related to the type of courses taken. There is some evidence, for example, that people are willing to pay more money for courses that will advance their careers than they are to pay for courses taken for personal satisfaction or to get away from daily routine (Central New York, 1975).

In short, the policy issue of funding for participants in adult education will not be resolved by statistical manipulations of indices of income, participation rates, and perceived barriers. It is far more complicated than that and is further confounded by the data on dispositional barriers.

Dispositional barriers i.e., feelings of inadequacy as learners are typically mentioned by less than 10 percent of survey respondents. These barriers, however, fall at the opposite end of the social desirability scale from the situational barriers just discussed. Few people like to say that they are not interested in learning or that they lack confidence in their ability. Thus the "real" importance of dispositional barriers is probably underestimated in the survey data. Aside from the social desirability issue, there is the methodological problem that respondents who say they are not interested in further learning are frequently dropped from further analysis. Logically, it makes sense to ask only those who express a desire to participate in education what obstacles deter them, but such a practice obscures the true role of the dispositional barriers that are critical to debates about public policy. No doubt the large counts for dispositional barriers are to be found among those who say they are *not* interested in further education. And there is ample evidence that the so-called disadvantaged, precisely the group policy makers are most interested in reaching, are overrepresented among those expressing no interest in further education. Taking survey results at face value it quite likely to overestimate the participation that would result from financial grants to learners and to underestimate the amount of effort that would be required to overcome dispositional barriers.

Institutional barriers occupy a middle ground between the high counts for situational barriers and the low counts for dispositional barriers. Each state survey seems to have devised its own list of possible institutional barriers, but they can generally be grouped into five areas related to scheduling problems; problems with location/transportation; lack of courses that are interesting, practical, relevant; procedural problems related to attendance, red tape,

time requirements, etc.; and lack of information about programs and procedures. These are all barriers that the sponsors of educational programs could presumably do something about.

Of these institutional barriers, potential learners complain most about inconvenient locations and schedules and about the lack of interesting or relevant courses. Relatively fewer respondents cite lack of information as an obstacle to learning—although there is good evidence that adults do lack information about the opportunities available. In one study, for example, 35 percent of those interested in further learning said they they were deterred from participation because they did not want to go to school full-time, yet only 16 percent complained about a lack of information (Carp, Peterson, Roelfs, 1974). Surely had those respondents had accurate information, they would have been aware that there are probably opportunities for part-time adult study in their communities. One wonders if many perceived problems with schedules, locations, and courses are not ultimately due to a lack of information about the options that do exist.

If we are going to interpret accurately the demand for adult education, we are going to have to obtain better data about how much adults know about present opportunities and which barriers are real and which are simply convenient rationalizations. The barrier of cost and the barriers classified here as institutional are prime candidates for some good investigations into the extent of knowledge about them. Good data on the reality of these barriers will not eradicate obstacles that people *think* are barriers, but at least we would know a little more about whether we need to provide more scheduling options, for example, or more information.

In conclusion, the state and national needs assessments of the past few years have laid a good groundwork for further thought, study, and research. Because of the replication across studies, we can be quite confident of the pattern of learning preferences of adults, at least insofar as these are revealed through survey techniques. As to our ability to construct "demand curves" and to predict the probable impact of various entitlement proposals on participation rates, I doubt that much accuracy can be achieved, given the rudimentary development of research on "voluntary" education. We need a great deal more understanding of the extent of slippage between market surveys and actual participation; and we need much more study of the motivational factors

affecting adult participation in learning activities. Our inability to deal in precise predictions, however, should not preclude serious attention to some of the policy questions raised and to the need for further research of a more intensive nature than that used in the "needs assessments" reviewed here.

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Appendix

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PARTICIPATION IN RECURRENT EDUCATION: PROBLEMS RELATING TO THE UNDEREDUCATED AND UNDERPRIVILEGED

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Introduction

As more and more criticism comes to be levelled at the existing education systems, increasing interest is being taken in the idea of recurrent education¹. Unless special measures are taken to support underprivileged groups, however, an expanded system of recurrent education is very likely to increase the differences within and between generations. (cf. CERI, 1975; Cross & Zusman, 1978).

That learning takes place outside organized education has sometimes—for example in the “deschooling” debate—been seen as a reason for society to reduce the resources which are invested in organized education. However, such a stand would to a higher degree disfavor the underprivileged groups. The idealistic appearance which often surrounds life-long learning easily conceals the fact that the process of informal learning is not always positive and

¹For present purposes, recurrent education is taken to include all education embarked on by the individual after previously completing or discontinuing basic education, usually after an intervening period of job experience. Recurrent education and adult education are used interchangeably in this text.

developing. For example monotonous working conditions and bad living environments encourage the individual to be inactive and repress his possibilities to ascertain himself.

To correct the social bias of recruitment, a system of recurrent education needs to include positive discrimination in favor of the educationally weakest groups. In addition to socio-economic measures, greater interest will have to be devoted to the total living situation of these people. Participation in recurrent education is not an activity apart from the rest of a person's life, it is closely bound up with the various roles occupied by the adult, such as the family role, the vocational role, the social role and the leisure role. In order to be able to take the right measures to reach the underprivileged, we must improve our understanding of the reasons why adults participate in education and the factors which influence their motivation.

Research so far into recruitment and motivation is unfortunately distinguished by its lack of theoretical application and the absence of an overall view of recruitment questions. This state of affairs has inhibited the development of research and limited the possibilities of taking practical measures in the light of the findings obtained:

A Paradigm of Recruitment in Recurrent Education

Figure 1 shows a paradigm of recurrent education recruitment whose fundamental structure is ahistorical. It is based on the hedonist principle, and can be seen as an application of Lewin's formula $B=f(\text{Person} \times \text{Environment})$. In structure it mainly agrees with Tolman's model (vid. Tolman, 1959, p. 99).

Participation in recurrent education is regarded as a function of the individual's interpretation of his psychological field. Previous events in his life are interesting only insofar as they have left traces in the present lifespaces. These traces are regarded as forms of active preparedness and are regarded here as a hypothetical variable reflecting the individual's personality, ability, knowledge, convictions, etc.

In the current situation, attention is devoted both to the environment and to the individual. Concerning the former, the focus of attention is on factors in the current environment which may conceivably stimulate or inhibit participation. I have argued elsewhere (Rubenson, 1977) that the degree of hierarchic

structure in the environment and the values of the member and reference groups appear to be of central importance. Another influential factor is institutional policy, e.g. admissions policies and financial aid systems. There are of course other factors which, to varying extents, influence the participation of different groups. Hierarchic structure and the attitude of those around the individual and study possibilities, however, appear to be of general significance and have therefore been accorded special status in the paradigm.

The other main component comprises the current needs of the individual, which among other things reflect the developmental tasks confronting the individual during his life cycle. Like all paradigms, that presented in Figure 1 is a simplified image of reality. Quite naturally, the three groups of independent variables—previous experience, environmental factors, and current needs—are not mutually independent.

As the cognitivists maintain, a person's actions cannot be explained only in terms of the actual situation.

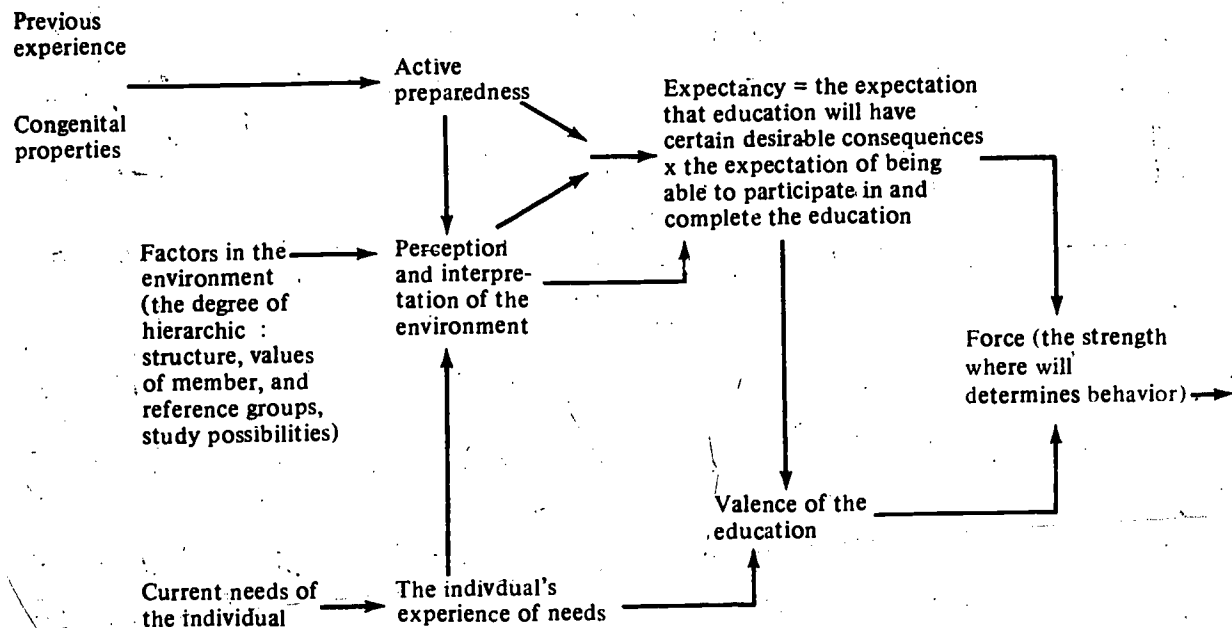


Figure 1: Paradigm of recruitment in recurrent education

One has to take into account how the individual perceives and interprets his situation. In the paradigm this is shown by the two levels of intermediate variables. The first level comprises active preparedness, perception, and interpretation of the environment and experienced needs. In the paradigm it is shown how these three determine valance and expectancy, which then result in a force whose strength decides behaviour.²

Using the paradigm as a starting point, the aim of this paper is to touch upon a few factors which may explain the low participation by the underprivileged groups in recurrent education. First motives and recruitment impediments are discussed.

Motives and recruitment impediments

Table 1 is a summary of some recent findings.

Table 1: Motives for Participation in Recurrent Education

Findings	Writers
One powerful reason for participating is the desire to make practical use of the knowledge acquired.	Tough (1969); Johnstone & Rivera (1965); Robinson (1970); NIAE (1972); Cross & Zusman (1977).
Most of the persons taking part in adult studies aimed at particular qualifications were not doing so because they had long considered beginning to study but because they were in a situation which required them to study (a change of family situation, illness, a change of work, etc.)	Johansson & Ekerwald (1976).
Retirees looked for courses where they could acquire knowledge which would help them to adjust to their new role in society. This demand was far greater than the supply of such courses would suggest.	Hiemstra (1972).
Hobby-oriented courses play an important part in providing opportunities for social contact for persons whose situation otherwise presents limited opportunities of this kind, e.g. housewives.	Rubenson et. al. (1976).
Housewives tended more than others to state that they participated to "get out of the rut" and "see new faces".	Emanuelsson et. al. (1973); Johnstone & Rivera (1965); Rubenson et. al. (1976); Cross & Zusman (1977).
Persons from the lower social classes, who have relatively simple jobs, mostly state that they participate in order to be able to change jobs, while persons of intermediate and high status, who have jobs presenting opportunities of development mostly state "a help in my present job".	Johnstone & Rivera (1965); Kamienskii (1975); Johansson & Ekerwald (1976).
Non-vocational motives, such as improving one's general knowledge and having something enjoyable to do in one's spare time, are far more common among persons of intermediate or high social status than among persons of low social status.	London et. al. (1963); Douglass & Moss (1968).

²For a detailed description of the paradigm see Rubenson (1976, 1977).

The findings show that there is a connection between the situation in which people find themselves and their participation in education. They also indicate that the less well educated often do not perceive education in terms of personal growth or self-realization.

Importance of recruitment impediments

Far more interest has been devoted to motives for study than to recruitment impediments. To clarify the recruitment picture, however, both obstacles and motives must be accounted for. Unfortunately, recruitment obstacles have often been studied by means of instruments in which external environmental obstacles have overshadowed what are called psychological impediments.³ The results give the impression that most of the individuals not participating in adult education are nonetheless highly motivated to avail themselves of the opportunities provided, but that they are prevented by external factors from doing so. Another shortcoming is that one primarily concentrates on how often various obstacles are mentioned without considering how well they discriminate between persons with varied dispositions towards recurrent education.

Many studies have shown that external factors dominate, primarily the economy, working-schedules and child-care. This should be seen against the instruments that have been used. In the list of impediments there was in general a lack of treatment of obstacles of a psychological nature.

In many cases there has been no relationship between environmental obstacles and participation or interest in recurrent education (cf. London et. al. 1963; Johnstone & Rivera, 1965; LØ-medlemmen, 1968). To a certain extent this may be an artifact of methodology. In these studies data were collected on only one occasion, and analyses were made by dichotomizing respondents into groups according to participation/non-participation or, alternatively, interest/non-interest. In studies where the design has allowed the investigator to examine obstacles in

³ Psychological impediments are impediments related to the self-confidence of the individual, his level of aspiration, and his attitude to adult education.

light of both previous intentions and actual participation we get a somewhat different picture. When obstacles among less well educated were studied in this way it was observed that those who wished to participate but did not stressed external obstacles to a greater extent than those who had participated. "Too little information" and "lack of time" —because of child-care and work-schedule—were especially strong deterrents among those who wished to participate but did not. This group, however, also had more pronounced psychological obstacles than the less well educated who participated (Rubenson, 1975; Rubenson et. al. 1976). That child-care and shiftwork constitute considerable obstacles is, as stated, quite clear. The results show, however, that it is not solely outside obstacles which hinder those interested from studying. To the same extent, it also concerns anxiety towards study, as well as the fact that one sees no connection between the daily situation and participation in adult education.

Those who had never desired to participate nor did so were characterized by their reference to psychological impediments, while those who participated rarely mentioned these obstacles.

In short, available data suggest that the most powerful psychological impediment is the individual's belief that participation in adult education would not improve his general living situation or give him any advantages on the labor market. This attitude is often, especially among older people, linked to a fear of studying. One has learned that "education is not my cup of tea". In many cases, though—not by any means in all cases, this is connected with a negative school experience.

The great emphasis thus placed on psychological impediments does not imply any attempt to belittle the importance of external environmental obstacles. As transpired from the experimental activities in Sweden by FÖVUX⁴ (SOU 1974: 54, p. 42), the existence of possibilities to study entirely or partly during working hours has a powerful recruitment effect. Thus, three-quarters of the shift workers who were offered the chance of studying during working hours felt that the conditions attached to studies

⁴The Committee on Methods Testing in Adult Education: Outreaching Work and Study Circles.

directly influenced their decision to participate. On the other hand, the incentive grant of \$70 had no perceptible effect. Study assistance—compensation for the extra expenditures involved for fares, meals, and child-care—had a certain effect on recruitment among housewives but was otherwise immaterial.

Furthermore, lack of economic support is a major barrier to full-time study (Johansson & Ekerwald, 1976; Cross & Zusman, 1978). Thus, in order to understand recruitment problems we have to observe both external environmental and internal psychological obstacles.

One conclusion that can be reached is that there is a great demand for resources to be used for active recruitment among the underprivileged groups. I shall return later to the form this should take.

Self-Evaluation and Value of Member and Reference Groups

In the previous section we have seen how the expectancy concerning recurrent education influences participation in it. The self-evaluation of the individual, as well as the value of member and reference groups are important aspects here.

Self-evaluation

In connection with participation in recurrent education I would like to draw attention to the extent to which childhood-, school- and work-environments with which the individual has come in contact are hierarchically ordered, i.e. the extent to which one's behaviour is controlled from above. A permissive environment in which the individual is given great scope of action should be capable of leading to various opportunities of reinforcement and thereby developing self-evaluation in a positive direction.

It has frequently been shown that changes in the work environment have led to greater activity on the part of the individual (Gardell, 1976). One important requirement in connection with the changes occurring in working life is therefore to try to incorporate a greater element of education in work and in doing so to try to design jobs in such a way that they demand such activities. In this way one may partly counteract what Meissner (1971) dubs "the long arm of work"—referring to the fact that limited opportunities of

independent initiative in the work situation affect the ability of the individual to participate in leisure activities posing such requirements. Ultimately the issue at stake concerns the allocation of the proceeds of production. For example, should efforts focus on longer holidays, shorter working hours and better pay or on the transformation of the work situation so as to give more people the chance of satisfying their needs through their work, thereby increasing their prospects of developing their full potential?

Changes in working life are most probably a necessary precedent if recurrent education is to have any effect on equality. In connection with democratization within the working life, recurrent education can be a means not only for the individual but also for the collective to change their situation. If the work tasks are organized in such a way that they make greater demands on new information, while simultaneously the individual is given considerable opportunities to influence his work situation, the possibilities increase that education will be experienced as something meaningful. It is important to point out that this does not only affect occupational education in the narrow sense but it also applies to education in general. It will probably affect the person's own participation in education but also it will lead to an increased commitment to his childrens' education and thereby bring about far-reaching effects.

Member and reference groups

On this point I would refer to Newcomb (1950, p. 225 f), who introduced the concepts of member and reference groups. According to Newcomb, the former type is a group of which the person is an acknowledged member, e.g. the family or political or religious. The individual shares the norms of the group not only because he is acknowledged but also because he has learned to satisfy his needs on the basis of the commonly accepted norms. Often, however, one learns to utilize norms from other groups of which one is not an acknowledged member. This is why Newcomb believes it is fruitful to distinguish between member groups and reference groups. We may assume that all member groups serve as reference groups, one way or another, while on the other hand not all reference groups serve as member groups. Brunner (1959) touches on the relation between participation in recurrent education and the norms of the member groups, and he refers to a study by Houle (1947), which showed that education

programs based on the interests of individual persons reached smaller numbers of people than those which were based on the pattern of values in the group. Thus it was found that the course preferences of the persons consulted were determined more by the values of the group than by individual interests.

Newcomb's approach is fruitful not only when one wishes to explain differences of participation frequency between less well-educated and well-educated persons, or the behaviour of minority groups, but also when trying to understand the differences existing within the under-educated group. Several studies have shown that white collar workers, regardless of occupational level, participate in adult education more than manual workers (LO-members and education questions, 1968; Johnstone & Rivera, 1965; Rubenson, 1975). Rubenson (1975, p 224 f) found no differences between the two groups with regard to outward impediments, but he did find differences in their attitudes to education. One possible explanation is that the former are influenced more than the latter by other people besides their co-workers, the latter being regarded for present purposes as a member group. In many cases it is a question of persons who may conceivably form a reference group with a positive attitude towards adult education. To this is added the fact that the working group, regarded as a member group, has by tradition constituted a stronger pressure group among manual workers than among white collar workers. This is discussed, for example, by Miller (1967), who observes the conflicts existing in the U.S.A. between the value of the working class and the values represented by the educational institutions. According to Miller, this conflict is manifested by the indifference of American trade unions to questions concerning recurrent education.

It is clear from the experience and the theoretical approaches mentioned above that it is not enough to try to inform and influence individual persons; one also has to work through the groups to which the individual belongs and identifies himself with. This has been made apparent not least by the experimental outreach work conducted in Sweden.

Particular interest attaches to the line taken by the trade unions and employers. Thoroughgoing changes in the educational situation of the employees will probably require, among other things, greater

involvement of trade union organizations in matters connected with recurrent education (cf; von Moltke & Schneevogt, 1977). One step in this direction is for the trade unions to endeavour, by means of legislation or collective bargaining, to gain added control of education. My reason for underlining the importance of the trade unions so heavily is that they should be capable of playing an important part in bringing about a scheme of adult education that is conducive to systematic change and which provides the collective with a means of obtaining better conditions. The great majority of adults in ordinary occupations and with ordinary social conditions cannot improve their situation by means of individual careers, by "doing something else".

Program Possibilities

In this section I will discuss curriculum, information and finance.

Curriculum

In the theoretical considerations underlying the sketch in Figure 1 (page 22), participation is very much dependent on whether the individual sees any value in education, i.e. whether he expects through education to meet the demands made by him, thereby influencing his own situation. One probable reason for the relatively low participation of under-educated persons and for the declining educational interest of persons over 40 is to be seen, in the present writer's opinion, in an incongruity between the demands made on people and the educational opportunities available. To this must be added the possibility that relevant opportunities may exist but the person may be incapable of relating his current needs to those opportunities.

The courses offered by the educational organizations are, to an excessively high degree, determined by the demands of the privileged groups. The minority groups and the less-well educated have fewer possibilities than others to affect the supply.

In this connection, it may be worthwhile presenting some of the findings from a Swedish survey of study needs and study impediments among under-educated (Rubenson et. al., 1976).

The data were collected by interviews from approximately 1,000 persons. Interest to participate in recurrent education was mapped, departing from the expectations and demands with which the people concerned were confronted in their various roles. Interest in education was primarily linked to the actual work and leisure rôles. A great deal of interest was also aroused by courses relating to social and parental rôles. There was a particularly heavy demand for short courses. It was only the younger people who demanded education in order to change their occupation or obtain an occupation who asked for more comprehensive education.

In spite of a wide selection of courses that was offered, a large group stated that they had no opportunities of studying the course they desired. An examination of the actual curriculum shows that these statements are not entirely referable to ignorance of opportunities; they also reflect deficiencies in the range of opportunities. Persons looking for language or hobby courses had a good chance of finding such courses wherever they lived, unlike those who wanted training within their current occupations or a problem-oriented course relating to a parental or social rôle.

The most revealing finding, bearing in mind that the subjects of this study were under-educated persons, was the great interest which people took in education relating to their present occupations. The data show that this type of interest is not mainly to be regarded as a bid for advancement but rather as the manifestation of a need to master more thoroughly the tasks with which one is confronted, even though one can already cope with them satisfactorily. This may be due to a desire for greater job satisfaction or else to an apprehension of failure.

At present there is hardly any education corresponding to the needs which thus transpired. Firms offer training and education, but these activities are governed by the needs of the firm and not by those of the individual. Competence-oriented adult education includes a wide range of vocational training, but these courses are often relatively general and comprehensive, and tied to a fixed syllabus. What is lacking can therefore be described as a less ambitious form of vocationally-related education directly referring to the work situation of the individual participant.

To meet these needs it was suggested that the existing programs should be supplemented by study circles⁵ connected to the work rôle which would help participants to view their work situation in a broader context, as well as supplying them with vocational knowledge. The study associations would have to show an interest not only in liberal and union education but also in occupationally-related educational programs.

Experiments carried out within the Workers Educational Association show that through occupationally related study circles it was possible to recruit persons who had never previously considered participation.

The limited number of under-educated persons who actually participate, is, of course, not only due to lack of opportunity. This has been shown to some extent in the above-mentioned research by Rubenson et. al. (1976). This study reveals that almost half the people wishing to participate in education with a view to changing occupations or being able to acquire an occupation (housewives and unemployed) were positive towards the idea of participation in competence-oriented adult education. This shows that under-educated persons in a situation where competence-oriented adult education is intended as an aid to the individual are in fact highly positive towards this form of education. However, the follow-up study conducted as part of the project shows that many of the people who had been desiring competence-oriented education were incapable of translating their interest into action. They could not see any practical possibilities of pursuing and completing studies (cf. the expectance component in Figure 1). This shows that the society has to give increased support if competence-oriented adult education is to be capable of playing its intended part, e.g. through educational leave of absence from work.

It is always difficult to make a comparison between studies from different countries. In the review which

⁵ Study circles have been the Swedish study associations' characteristic pedagogic form ever since these associations were created at the beginning of the 20th century. A study circle can be defined as a group of comrades where the participants and the group leader jointly determine the formulation of the studies. These are based on the participants' own wishes concerning rate of study and course material, and are not guided by a pre-determined syllabus.

Cross and Zuzman made on the needs of non-traditional learners in U.S.A. they arrived at a result which partly corresponds with that reported above. In both cases it was concluded that the work role is an important basis upon which to reach the underprivileged groups (either it is to obtain occupations, change employment or improve themselves within their own employment). New directions must be followed—directions determined not by the traditional school system, but determined rather by the groups one wants to reach.

Information

Research on channels of information has shown that various forms of personal contact have great significance in stimulating an interest in studying. When the person has decided to pursue education, such channels of information as advertisements, brochures and printed matter in the letter-box obtain increased importance e.g. in helping to choose a special course. However, they do not to a great extent affect the basic attitude towards recurrent education.

As the disadvantaged live in a poor educational environment they have relatively few possibilities to hear about a course from friends. Thus they require information from sources other than acquaintances. It is in this connection that out-reach work should be seen.

Since the beginning of the 1970's the Swedish government, in its effort to increase recruitment of the underprivileged has encouraged experimental out-reach programs. The experience thereby gained has shown that this is an effective method to reach the target groups. Out-reach work which has been conducted at work places, thereby involving the overwhelming majority of the work group, has been far more successful than similar activities conducted in housing areas (Statens Offentliga Utredningar 1974:54; Brostrom & Ekeroth, 1976). All experiments hitherto have served to underline the importance of out-reach work operating through the medium of organizations to which the target persons belong. This constitutes a particular problem where minority groups and homemakers are concerned. It has also been shown that it is not enough just to contact the presumptive participant but that a considerable time must be set aside for the visit.

Financing

Whether in the future one will be more successful in recruiting the disadvantaged, depends to a great extent on priorities concerning resources and offer.

In this connection I would like to point to some conclusions which can be made from the developments in Sweden in the 1970's. During this period the subsidies to adult education were heavily increased.

The aim for equality has come to be the overwhelming goal in all types of adult education. The aim of the allocation policy is directed towards an equalization of the actual living conditions, i.e. economical, political, social and cultural resources. During the last decade there has been a substantial increase in the numbers of adults taking part in education. Has this resulted in an equalization? No, Brostrom and Ekeroth (1977) answer. Even though the Swedish people as a whole have increased their resources, the differences between participants and non-participants were almost as great in 1974 as in 1968.

Among other things this is explained by the fact that there has been too much faith on what a general strengthening of resources for recurrent education could lead to. If one tries through one and the same measure to fulfil both allocation and service-policy goals (meet the individual wishes), one must be aware that the allocation effects will be very limited and accomplished at the price of great service policy costs.

The general character of the subsidies has made it difficult for organizations who seek to obtain allocation effects. As they could not compensate for the increased costs involved in recruiting the underprivileged, they have been forced to concentrate on other groups.

To bring about a change it is necessary that the future subsidies are ear-marked to a much larger extent than has previously been the case. This however requires one to express more exactly the group whose living condition should be equalized and deeper knowledge of which study methods and which content that can create allocation effects. These aspects are basic when one, e.g. in the U.S.A., decides on the system for financing recurrent education (cf. the discussion in connection with entitlements, NIE, 1977).

Future Research

Research into recurrent education recruitment has been inhibited by lack of interest in formulating a testable theory. Research so far has neither yielded new points of inquiry, confirmed uncertain findings nor developed new methods. In fact, the investigations which have dealt with participation in adult education have been of strikingly little intradisciplinary importance.

A more dynamic approach needs to be adopted, in the realization that variables such as age, educational level, etc., are of subordinate importance *per se*. As the paradigm in Figure 1 indicates, one ought instead to investigate the preparedness of the person for participation, the environment in which he lives, the forces in that environment which stimulate or inhibit participation, and the dominant needs. In other words, an effort must be made to view participation in terms of the total living situation of the individual. Instead of a conventional investigation of interest in existing education routes—which many people have no idea about in any case—the task will be to plot the roles of the individual, e.g. in the family, during leisure hours, as a member of society and vocationally speaking, and to study educational needs and educational expectancy in terms of these roles. This strategy can be seen as one step towards a third phase of development in recruitment research, the first phase having entailed the description of those who take part, while the second involved a comparison of participants and non-participants.

The conceivable investigations mentioned so far have been of an exploratory character. I would also like to point to another type of research where one intervenes in and influences the life-space of the individual and in doing so observes the effect on expectancy, valence and participation. One relevant example is a combination of practical experiments in the form of out-reach work, and exploratory studies of the kind referred to above. Another example is to try to alter the environment in which the individual finds himself placed, so as to give him greater control over his situation. This is highly topical with regard to the working environment. In terms of the paradigm, the question arises how the degree of industrial democracy and the ability of the trade unions to influence and supervise education, opportunities of educational leave, etc. influence the factors of expectancy and valence.

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A Report of a Conference on Lifelong Learning: ADULT LEARNING NEEDS AND THE FUTURE DEMAND FOR LIFELONG LEARNING¹

James Broschart

Introduction

Lifelong learning has emerged in this country over the past few years as a convenient designation for an increasingly focussed concern for the total learning needs of persons in our society. The Congress has passed legislation acknowledging a national interest in all of the aspects of learning throughout the lifespan, including those which go beyond youth education and formal schooling. Lifelong learning provisions in P.L. 94-482, the Higher Education Act of 1976, have formalized a federal level of concern. In response to the legislation the Department of Health, Education, and Welfare has reported on the status of lifelong learning in America in January, 1978.

The Conference on Adult Learning Needs and the Future Demand for Lifelong Learning represents one of the many undertakings which have been designed to develop such information. For three days in September, 1977, the National Institute of Education, through its Finance and Productivity Group, brought together researchers, administrators, and policymakers in order to share information about current investigations of adult learning needs and to discuss how these needs might be reflected in demands for learning services in the future. (A list of the participants in the conference is included as an appendix.)

This report of the proceedings of the Reston Conference will contribute, it is hoped, to the development of an informed national overview of the status of lifelong learning.

Introductory Themes

Examining the possible extent of demand for lifelong learning was a central theme for this conference. Among educators and policymakers, innovative ideas often achieve a momentum of their own, sometimes unrelated to evidence of need. At the same time it is often easier to think of programmatic undertakings than it is to examine need as a basis for new thrusts. Participants were asked to respond to a set of basic issues: Is there, in fact, a 'need for' something called Lifelong Learning? When adults do display an array of learning needs, is there at the present time among providers and policymakers any basis for a sense of priorities? Which needs should be subject to public support?

These were the broad areas of questions and concern put forward by Charles Stalford, conference coordinator for NIE, as the rationale for the conference. The hoped-for outcomes were to (1) develop a sense of the possible demand for lifelong learning as suggested by an investigation of adult learning needs and (2) organize a set of proposals for

¹Sheraton International Conference Center, Reston, Virginia, September 26-28, 1977.

future investigations which might draw upon the expertise of those present and their familiarity with the state of the art in the various fields touched by the concept of lifelong learning.

A context for these deliberations was provided by two preconference documents prepared by K. Patricia Cross and by Kjell Rubenson. The Cross paper is entitled "A Critical Review of State and National Studies of the Needs and Interests of Adult Learners," and the Rubenson paper "Participation in Recurrent Education: Problems Relating to the Undereducated and Underprivileged".

Ellen Hoffman, who did the staff work for Senator Mondale on the Lifelong Learning Act, described the history of the legislation. She explained that the legislation originated because Dan Ferber, founder of the "Minnesota Learning Society", proposed to Senator Mondale that some type of federal role be developed in the area of lifelong learning.

In June, 1975, Hoffman said, the Senator gave a speech at a conference on aging in which he pointed out the relevance of education to the elderly and outlined a proposal for a bill. The bill then became the subject of extensive discussions and redrafting by an informal group of representatives of organizations and individuals with an interest and expertise in lifelong learning. This working group consisted of representatives of many major national education organizations, unions, and organizations representing the aging.

The Higher Education Amendments of 1976, under consideration by the Senate Education Subcommittee, were seen as the logical vehicle for enactment of such a proposal. Subcommittee staff indicated, however, that the bill would have to be redrafted to somehow fit into the existing Title I of the Higher Education Act and to meet objections that it would simply result in creation of "another categorical program" whose functions might, duplicate those of existing programs.

Redrafting of the bill started almost from the day of its introduction, continued through December, 1975 (when a hearing was held in the Senate) and into the following spring, Hoffman said.

She explained that the Lifelong Learning Act as adopted by the subcommittee and full committee and the Senate represented a consensus among the interested groups that it was the best possible version in light of certain political realities:

1. The limited amount of funding expected to be available

2. The difficulty of reaching agreement on a precise definition of the term, "lifelong learning"
3. Fears of constituencies of other programs that their influence or stability might be threatened.

While the bill was under consideration in the Senate, attempts were made to gain House sponsorship, but they were unsuccessful. When the Senate and House Education bills went to conference committee in the summer of 1976, Mondale was campaigning for the vice presidency and was not able to be present personally to argue on behalf of his legislation. The informal task force again went into action, this time to convince House members to accept some version of the legislation; and with some changes requested by Rep. Quie, the ranking minority member of the House committee, the bill received approval of the conference committee.

Hoffman emphasized that important tasks remain to be accomplished before implementation of either the new law or the general concept will be a reality:

1. Clear definition of the term, "lifelong learning" and how it should or should not be related to existing federal programs and efforts.
2. Marshalling of information and arguments which will be needed to convince policy makers to encourage lifelong learning opportunities on local, state and national levels.

She urged participants in the conference to address themselves to these types of questions and to produce recommendations both relevant to and easily understood by policy makers.

Michael O'Keefe, who is Deputy Assistant Secretary for Planning and Evaluation/Education in HEW, took up this theme and commented on his perceptions of the education policy stance within the present Administration. There will be no large amounts of new dollars over the next five or more years for lifelong learning programs. The present \$180 billion annual budget of HEW is, under reasonable assumptions, expected to increase by only about \$12 billion for new needs through 1981. A critical element in this administration's approach to social needs funding is a Presidential goal of a balanced budget with full employment by 1981. For education interests this suggests limited growth, with little likelihood of a major entitlement program.

One of the difficulties with lifelong learning is the term itself: it is both its allure and its basic flaw, since it promises all things to all people. If the programs

which are mounted under this banner cannot deliver there is a danger that its various support groups will dissipate. Mr. O'Keefe argued that lifelong learning advocates should concentrate almost exclusively on groups with clear needs whose support can be justified as public concerns.

Among the issues which emerged from the general discussion of the two presentations, several were identified as central to any examination of the Federal role. One of these was the question of whether a redistribution of federal dollars might result from demonstrating that lifelong learning is a major social service vehicle. That is to say, could scarce dollars be reallocated to lifelong learning programs if the identification of needs is such that welfare costs, say, could be reduced through the realization of certain lifelong learning needs? This kind of question might be measured against another area of query: whether we would bother to talk about lifelong learning at all if no federal dollars were involved. Would we, instead, be more properly served by discussing social justice and by turning our attention toward identifying the basic needs resulting from the underlying social inequities in our society?

Assessing Learning Needs

Plenary sessions of the conference concentrated on addressing some of the major problems surrounding the assessment of learning needs. This was a discussion based, in large part, on the Cross and the Rubenson papers.

A primary concern continued to be whether it was possible to talk about lifelong learning without confronting issues of social equity. One reason this question remains significant is because present approaches to studies of needs usually group people within biographical and demographical classifications, and the consequent findings generally describe the needs of social groupings. It is necessary to devise more varied and imaginative ways to set study categories. An example of this would be Bruce Hamilton's approach in the Iowa study of grouping by educational goals. This sort of approach can yield useful homogenous data.

The difference between 'demand' and 'need' for learning opportunities was a significant issue. Contemporary research seems to indicate that demand, meaning actual participation, is manifested by the 'privileged' (i.e., those with higher socio-economic status or prior educational attainment). Need, meaning aspirations but not participation in learning opportunities, is more frequently dem-

onstrated by the less privileged. Notwithstanding the above, there may be human needs (e.g., coping skills) cutting across degrees of privilege which are not being satisfactorily met.

Even more significantly, differences in both the understanding and the use of 'education' and 'learning' are found to be tremendous, and in themselves contribute heavily to major discrepancies in the results of contemporary studies of needs.

This is a situation, of course, which leads directly to implications for policy formulation. Should funds be made available for education or for learning—that is to say, for institutions or for individuals? How much of the accumulated research on need is reliable if these distinctions and definitions vary widely?

Designing Research

Are the models for research in this area reliable? Should basic redesign be a prerequisite for any future funding of needs assessment? Most state level needs assessment tend to identify and describe present activities or behaviors in terms of three groups: participants, would-be learners, and nonparticipants. Most of the state studies are in fact a marketing survey ("What should people have?"). Moving beyond this in increasing both the sophistication and the specificity of needs analysis is not only critical in terms of the ultimate value of this research, it is also essential politically.

National needs assessment appears to be an elusive ideal, perhaps appealing only for political necessities. There are significant differences among regions in this country; differences in urban-rural mix, mean age, levels of educational attainments, and an array of other demographically significant variables. Among the most rich and interesting of the contemporary state studies are those of California, Iowa, Florida, and New York, which, when considered together demonstrate important regional differences. Within New York State alone, in fact, it proved to be appropriate if not absolutely necessary to develop substate regions for the purposes of accurately depicting educational needs, with each region undertaking its own study.

One problem that can be identified with state-level studies is that, thus far, they have looked at needs in a "snap-shot" fashion, while needs are in a continuing state of change. There is little useful trend data, and what is known is very gross.

Emerging Issues

The relationships among compulsory schooling,

formal youth-oriented education, and the larger scope of lifelong learning give rise to many of the problems in both needs research and policy formulation. Americans start from a view that compulsory schooling to a certain age is a good thing for individuals in our society. This has become institutionalized, state by state, into what amounts to a national social policy. Out citizens are led to believe in a concept of education entitlement supported by the force of law. This circumstance, in which we all share and participate, has the effect of designating education as a social equity situation. In fact, the terminology we employ—e.g., 'under-educated'—itself provides a basis for equity issues. A society supporting an initial life period of compulsory and socially sanctioned youth education is inevitably led to ask equity-relevant questions of further schooling and possibly of any further learning activities.

Today the debate over access and entitlement to formal postsecondary education is widespread and very much a part of our national dialogue. We are also concerned with asking questions about the relevance of educational situations to social circumstances, such as the current controversy over relating education to work and the concern for the transition between school and job. We are urged to consider some European critiques of this country for ignoring the dynamics between social need and social policy; these observers contend that the school experience, perhaps in its entirety, should respond to the fact of a 'real industrial world.' The claim is pressed that compulsory schooling should be largely vocational in content and context. The step beyond that for these critics is to insist that education past the compulsory level should also be work-oriented if it is to receive the support of the society. The policy issue is whether any further education which is not work-related should receive either public funding or legislative acknowledgement.

If this point of view were to prevail it would shift the emphasis in needs research away from the individual "consumer" of educational offerings toward an identification of social needs and an assessment of social priorities. 'Need' thus becomes a much more complicated and politically sensitive signification. How does the construction of research proceed under those conditions?

It can be anticipated that these questions will become more and more germane to lifelong learning ventures as the shift in the population bulge in this country and around the world forces public attention toward adult, rather than youth, learning require-

ments. The conference participants felt that educators and policymakers who today are concerned with adult education and learning cannot continue to operate much longer in what until recently has been out of the center stage of both education and of social policy.

Research has been slow in responding to areas of education which have already become contemporary undertakings. One such area is worker-related education, viewed as a function of the labor movement and as a result of the evolution of bargaining agreements in commerce and industry. Today this is reflected in the development of labor education centers and family educational opportunities in industrial settings as well as "white collar universities", self-contained within larger corporations. Needed areas of research include utilization, participation, and success of these various facets of work-related education.

Another component of lifelong learning as it affects social groups is the policy implications of the language (tongue) of instruction. This might be expressed as a conflict between 'real needs of diverse people' (e.g., Spanish speaking populations) and the institutionalized requirements for success in the general society. Here social policy is uneven at best and often nonexistent, and the lack of broad-based research into need, demand, and requirement is often named as one of the sins of omission which has led to misunderstanding and the absence of legitimate educational alternatives. Again, in this context, the relationships of educational accessibility and job achievement cannot be ignored.

Again and again the general conference discussion returned to a basic concern for whether education, much less learning, can be usefully considered out of the context of the social equity issues underlying many questions of learning needs. Numerous comments supported the view that the difference between the privileged and the less privileged, in a nation as rich in educational undertakings as this, is the difference in the availability of options. The social policy consideration becomes one of finding ways to equalize options, and among those options is the one of opportunity to learn.

Small Group Discussions

Smaller groups were formed to examine in more detail the particular concerns which were emerging from the general conversation. Discussions within the three groups were varied and wide-ranging. The

following is a representation of the many topics raised.

One group was concerned with encouraging a view of the total adult learning context which would extend beyond those adult learning activities which have traditionally been recognized as educational undertakings. There is some indication that the Congress and various agencies in the federal government may be willing to talk about 'learning' generically, compared to a past focus on 'education', meaning formal delivery systems. Researchers should be encouraged to recognize the several domains of needed investigation: the *who* of adult learning, or the constituencies to be served; the *what-where-when* of delivery techniques and systems; and the *how* and *why* of the process of learning.

This group also sounded a note of caution, by urging researchers to examine very carefully the appropriateness of continuing to ask the disenfranchised and the less privileged what it is that they want, since there are strong indications that some populations and groups perceive this sort of continuing "probing without payoff" as a mockery of their situation. Would it be more possible in the future to make such research legitimate and available to those persons being examined? If we, as researchers, can approach and even embrace the points-of-view of those we investigate, we might also take the step toward asking hard questions about the data we assess. The query, "just who is making what kinds of claims about which adult learners?" should encourage us to examine the motives of the researchers as carefully as we examine the validity of the data.

Encouraging researchers to focus on people rather than on programs was also the concern of another group, and they developed other aspects of what was becoming a major conference theme. Researchers looking into the varied dimensions of learning needs should always be encouraged to start by first asking what some of the assumptions are which are usually taken for granted, and then be urged to conceptualize anew when designing research into both the unexplored and the already explored areas. The established models for field study in education and the social sciences, however venerable, need serious reevaluation.

Perhaps it is not as useful to look at demographic variables as it is to attend to both group and individual learning variables. One huge area still needing detailed exploration is adulthood itself: the life cycle and life stages, and the learning behaviors

and needs which might be associated with some regularity of patterns in adult experiences. In addition, we might sharpen our investigations into the effect of early education on later learning behaviors.

Another area for exploration was the nature of expressed demands. Differences and similarities among learners, non-learners, and would-be learners should be more usefully conceptualized and substantiated. We need research which yields a better understanding of individual perceptions of learning costs and learning payoffs, and we also need a substantive notion of how individuals perceive what is available to them. What would motivate adults to accept the more nontraditional modes for educational delivery? How can we build on uncovering such motivations? What are the new methods: their intent, their impact, their popularity?

Who would benefit from more sophisticated and reliable educational research? We have a number of "clients" for our research efforts: scholars and theorists, policymakers and decision makers, and practitioners. Who are we undertaking research for, and how do we render the outcomes of our investigations into a format most useful to our client?

The remaining small group concentrated their discussion on distinguishing between lifelong learning as a movement and the underlying phenomena which gave rise to such interests. They wondered if what was at stake was the "educational health" of the nation. Within the social policy forum it is usually possible to think and talk about physical health without hesitation; it is both individually and socially useful to be healthy. Education is generally assumed to be a good as well, but we have no body of research which might, for example, tell us the price we would pay as a society if individuals or groups suffer learning "illnesses."

The issue then moves beyond diagnosing the learning needs of our special populations, to include the legitimation of those learning needs in terms of the general "learning health" of the nation. This suggests, also, a diagnostic approach to learning needs assessment in significant life situations, such as identifying the learning requirements of people confronting divorce and its outcomes.

Another possible approach is to support less privileged groups and individuals across the board so they can compete with the more privileged in terms of their "educational health" buying power.

The point of this discussion was that education is, in fact, an intervening variable and not a final objective. It is the outcomes we are to be concerned

with as a society that should be the focus of our examination of social policies. Schooling has traditionally been a means utilized by society for socializing the young. Today's rapidly changing society cannot accomplish this aim during a brief span of youth education. If the socialization process is to continue into adult life, and if learning is a means whereby individuals cope with the demands of life in society, then access and the identification of learning needs become socially significant. Could there be circumstances in which compulsory adult education is essential? We agree that it is, for example, when we train individuals for participation in our armed services. The immense danger here, of course, is the one of designing policies which support a Big Brother society.

We can approach the diagnosis of learning needs by associating them with generic stages, interest groups, or some combination. Life stages, although subject to individual variations, offer a means of gaining insights into predictable general needs relative to occupation, marriage, family, aging, and so on. Interest groups present vivid clusters of particular learning needs, such as those associated with women entering the labor force who are heads of households, or the language needs of non-English speaking populations.

If we are to sharpen our attention to these approaches to the identification of learning needs, we might begin with two statements of immediate concern. One is that both youth and now old age are already the focus of much research into learning behaviors, even though more must be done. The span between about age 30 and age 60 is, by comparison, virtually untouched. We need major research efforts, broadly based, into learning during those periods. We have not only not discovered enough about life stages, but what little we do know has had a minimal impact in those institutions where we are training educators.

Another immediate concern is to inventory what we already know and do. Instead of inventing new programs and services, we should discover, first, what it is that we are already doing and move to an assessment of what is redundant and what is needed.

Suggestions for Further Work

In a concluding plenary session the participants pooled suggestions for areas which would benefit from future discussion, investigation, and research.

The most broadly addressed issue was the evaluation and understanding of participation in

learning. A basic question remains that of discovering the true extent of adult learning in the United States, including but going well beyond the participation in formal programs and courses.

Conference participants were concerned that we have not yet become fully capable of building upon what we can learn from existing programs within the scope of lifelong learning. More complete analyses of current participation is clearly called for in respect to all dimensions of learner and learning characteristics and the ways in which we have been responding to these. This should be undertaken in arenas such as commerce and industry, as well as what we more traditionally view as educational undertakings. It would be extremely useful to examine most carefully the failures as well as the successes in educational programming, and to measure past failures against what we are coming to know about participation variables.

A vast area requiring broad-gauged investigation, as well as very specific research undertakings, is the optimal conditions for learning. These should be approached from the point of view of examining individuals with respect to how, when, where, and why they learn. Again, failure as well as success should be investigated, and the apparent non-learner should be studied as thoroughly as the identifiable learner.

Along these lines, conferees tended to agree that life stage research offered a basic opportunity for approaching a more complete understanding of learning needs: how and why they develop, and how and why they can be satisfied. It is suggested that such research efforts might pay special attention to a concept of cumulation, or whether and how earlier life situations affect and inform those which may follow for an individual and for family groups. Additionally, researchers were urged to conceptualize around notions of social age as compared with chronological age, and also developmental tasks as they relate to the otherwise loose concept of life stages.

Again, the particular needs of the "educationally disenfranchised" and the socially less fortunate require special attention. Among the considerations for future work in this area, one of the most significant was felt to be the recruitment and encouragement of research professionals from within the ranks of these populations, in order to avoid the patronizing impact of the "we-they" research efforts in this area in the past.

The major contemporary dialogue over issues

relating to the transition from schooling to working should be supported. Conversation which has already developed around these topics is speculative and based on little more than best guesses. If public policies are to be made in this area it is imperative that they be informed by the best efforts social research has to offer.

The remaining body of concerns for future work is

by no means last in any ranking. It is, however, the most complex and least developed at this point. This is the major necessity for clarifying the concept of lifelong learning itself, and from that to develop a coherent discussion of possible approaches, structures, and means for coordination of effort. Until this step is undertaken the result of all other work may not be fruitful.

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