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Slim Chance:
Adult Students' Access to University-Administered Merit-Based
Undergraduate Scholarships

by

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BSW, University of Victoria, 2002

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of the Requirements for the Degree of

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Abstract

University-administered merit-based undergraduate scholarship awards have egalitarian appearances that often mask the presence of eligibility criteria that funnel these awards towards some students and away from others. This thesis uses findings from a case study to examine whether adult students (undergraduates aged 25 year and older) have equal access to undergraduate scholarships at one Canadian university. Framed by understanding of relational differences between members of social groups and by how formal equality can result in differing experiences for those who are substantively different, this thesis first identifies how adult students differ as undergraduates; next it gathers data showing adult students' academic ability; and finally it statistically tests data showing the ages of recipients of scholarship awards to discover if adult students' are successful recipients in proportion to presence in the undergraduate community. A survey of ten other Canadian universities places findings in a wider context.

Supervisor: Dr. Pamela Moss (Faculty of Human and Social Development)

Table of Contents

Abstract.....	ii
Table of Contents.....	iii
List of Tables.....	v
List of Figures... ..	vi
Acknowledgements.....	vii
Dedication.....	viii
Chapter 1: Introduction.....	1
Statement and Significance of Problem.....	1
Background.....	3
Context.....	4
Thesis Outline.....	9
Chapter 2: Literature Review.....	14
Significance of Adult Undergraduate Students.....	14
How Adult Students Differ.....	22
Barriers Adult Face Accessing Education.....	31
Framework for Understanding.....	39
Chapter 3: The Study.....	47
Methodology.....	47
Research Design.....	48
Data Collection Methods.....	51
Analytical Methods.....	55
Ethical Approval.....	58
Chapter 4: Findings.....	60
The Case Study University.....	60
The Undergraduate Community.....	60
Eligibility Criteria for Undergraduate Scholarships.....	68
Findings from the Study.....	76
Statistical Testing – Entrance Scholarships.....	87
Statistical Testing – In-Course Scholarships.....	90
Statistical Testing – Part-Time Students’ Scholarships.....	92
Survey Findings.....	95
Entrance Scholarships.....	96
In-Course Scholarships.....	102
Part-Time Students’ Scholarships.....	104
Opinions of Respondents.....	105

Chapter 5: Conclusions.....	110
Summary of Key Findings.....	110
Discussion	117
Limits to the Study.....	120
Implications of Findings.....	122
Recommendations Arising from this Study.....	123
Directions for Future Research.....	124
Bibliography.....	125
Appendix A: Questionnaire.....	133
Appendix B: Approved Ethical Consent Letter for Data Gathering.....	135
Appendix C: Approved Ethical Consent Letter for Survey.....	138

List of Tables

Table 1: Undergraduate Population.....	61
Table 2: Study Preferences.....	62
Table 3: Part-Time Students by Age and Gender.....	64
Table 4: Undergraduates Entering University.....	66
Table 5: Total Value of Undergraduate Scholarships.....	69
Table 6: Raw Data findings: Entrance Scholarship Recipients.....	77
Table 7: Raw Data findings: In-course Scholarship Recipients.....	77
Table 8: Raw Data findings: Part-time Student's Scholarships.....	79
Table 9: Findings Grade Point Averages 2004/2005.....	81
Table 10: Chi-Square Results - Entrance Scholarships.....	87
Table 11: Chi-square Interpretation – Entrance Scholarships.....	89
Table 12: Chi-Square Results – In-Course Scholarships.....	90
Table 13: Chi-Square Interpretation – In-Course Scholarships.....	92
Table 14: Chi-Square Results – Part-Time Students' Scholarships.....	93
Table 15: Chi-Square Interpretation – Part-Time Students' Scholarships.....	93

List of Figures

Figure 1: Comparison of Raw Data Recipients of Entrance Awards.....	82
Figure 2: Comparison of Raw Data Recipients of In-Course Scholarships.....	83
Figure 3: Awards Made to Undergraduates Entering from High School.....	98
Figure 4: Full Time Status Definitions.....	99
Figure 5: Specific Groups of Students Excluded from Eligibility.....	101
Figure 6: Eligibility for In-Course Scholarships.....	103
Figure 7: Eligibility for Part-Time Students' Scholarships.....	104

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Without you all I could not have done it!!!

Dedication

In memory of my dear little mother
Cora Donegan

who was “balked” in her educational aspirations as an adult student.

Sometimes I think I am re-living your life.

Plus ça change, plus c'est la meme chose

Chapter 1

Introduction

Statement and Significance of Problem:

University-administered merit-based undergraduate scholarships in Canada that “recognize and promote academic excellence among the student body” (University of Toronto, 2005, 4) and “provide incentives for excellence” (Carleton University, 2005) appear to be egalitarian. However, there are often eligibility policies underlying entrance and in-course university-administered merit-based undergraduate scholarship provisions that have the effect of funnelling these valuable awards towards certain groups of undergraduate students and away from others. One group that might be disadvantaged by such eligibility policies is adult¹ students - that is undergraduate students aged 25 years and older (Sissel, Hansman, & Kasworm, 2001; Wilson & Rosen, 1999). Adult students might be disadvantaged because some Canadian universities specifically exclude them from undergraduate entrance scholarships (see for example McGill University, 2005); some set eligibility criteria that state recipients of entrance scholarships must be entering university directly from high school (see for example University of Victoria, 2005) or

¹ “Adult students” is a term often used in adult education literature to describe students aged 25 years and older. I chose to use this term in this thesis only for the purposes of differentiating those who are traditionally aged undergraduates from those who are not traditionally aged undergraduates. While I appreciate that all university students are adults I have chosen to call non-traditionally aged undergraduates “adult” rather than “mature” or “older” because these other terms just make me feel ancient. “Adult student” applied to those aged 25 and over, is not intended to demean those who do not fall into this age group in any way or to imply that younger students might not have adult responsibilities in their lives; it is intended only to distinguish those undergraduates who are aged 25 years and older from those undergraduates who are aged less than 25 years.

within two years of leaving high school (see for example McMaster University, 2005) when these conditions would be impossible for adult students to match; and many universities require recipients of both entrance and in-course undergraduate scholarships to be full-time students (see for example University of Western Ontario, 2005) when the majority of adult undergraduate students attend university on a part-time basis (Keast, 2000; O'Heron, 1997).

The purpose of this thesis is to investigate whether or not the eligibility policies used to determine recipients of university-administered undergraduate scholarships disadvantage adult students. This thesis shall compare adult students' success rates as recipients of undergraduate merit-based scholarships with traditionally aged undergraduates' success rates at one Canadian university. First it will examine the demographics of the undergraduate population and the eligibility criteria used to determine recipients of undergraduate scholarships at the university. Next it will compare the proportions of adult students who achieve the grade point average (GPA) above which merit-based scholarships are normally awarded with the proportion of traditionally aged undergraduates whose GPAs fall into this range. And finally, it will test data showing the age of recipients of undergraduate scholarships to see if there is a significant statistical difference between the rate at which adult students are awarded undergraduate scholarships and the rate at which traditionally aged undergraduates are awarded undergraduate scholarships. Findings from this quantitative study will be placed in a wider context through an examination of the results from of a survey of ten other

Canadian universities that questions whether similar eligibility criteria, and by implication similar outcomes, might occur at other institutions.

This research is framed by awareness of adult students' differences within undergraduate education identified through a review of adult educational literature, and by a theoretical understanding of both relational differences within social groups (Young, 1990) and the concepts of formal equality and substantive equality in the allocation of services (Denike and Renshaw, 2003). This thesis is important because, although university-administered merit-based scholarships are valuable funding sources for undergraduates, research has not examined adult students' access to these awards. As a consequence any inequities encountered by adult university students in undergraduate scholarships provisions have not been identified and highlighted.

Background:

Adult undergraduate students constitute a significant proportion of the undergraduate population of Canadian colleges and universities. The Association of Universities and Colleges of Canada reports that there are about 85,000 full time and 163,000 part-time adult undergraduate students at Canadian colleges and universities and that these numbers represent 17% of all full-time undergraduates and 70% of all part-time undergraduates (O'Heron, 1997). However, despite their sizeable presence adult students have been described by researchers as 'invisible' on university campuses (for example, Keast, 2000; Sissel, Birdsong, & Silaski, 1997; Sissel et al., 2001; Thompson, 1997).

Researchers suggest that this invisibility is the result of the many differences in adult students' lives that cause them to have restricted time to devote to their studies (for example, Fairchild, 2003; Lauder & Cuthbertson, 1998; Murphy, 1998; Wilson & Rosen, 1999). Some researchers have sought to raise awareness of adult students by identifying the many responsibilities and commitments that adult students combine with their studies (Campbell, 1993; Fairchild, 2003; Lauder & Cuthbertson, 1998; Murphy, 1998; Osborne, Marks, & Turner, 2004), while others have sought to highlight the different issues and barriers adult students face in accessing their education (Cross, 1986; Home, 1997; Wilson & Rosen, 1999). Although such research offers explanations of why adult students' might lack visibility on university campuses, it does not consider if there are any outcomes associated with this invisibility. And in particular it does not question whether or not there is a relationship between student visibility/invisibility and increased/decreased access to university support services. This thesis will investigate whether adult undergraduate students have equal access to one such support services: undergraduate scholarships.

Context:

Undergraduate scholarships are financial awards made by universities to "entering, in-course and graduating students to encourage and recognize high levels of [academic] scholarship" (McMaster University, 2005a). Scholarships are awarded based on academic merit only and they differ from bursaries ("non-repayable grant[s], not...loan[s]...intended to assist with a student's education related costs" - McMaster

University, 2005b) in that they do not require recipients to show they have a need for financial assistance as revealed through means testing and, in many if not most cases, they do not require recipients to make an application to be considered for these awards (see for example Concordia University, 2004).

University-administered merit-based scholarships are often funded by endowments made to universities by private benefactors that have been invested and the interest made available to students in the form of scholarships and bursaries (Tamburri, 2004). The amount of money held in endowment funds by Canadian universities is vast. In 2002, the Canadian Association of University Business Officers calculated that assets held in Canadian university endowment funds at that time totalled \$6.43 billion (Tamburri, 2004). The resultant interest paid on endowment assets each year is also considerable. Research undertaken by the Canadian Millennium Foundation has calculated that 73,590 undergraduate scholarships with a total value of \$110 million are awarded each year by Canadian universities and colleges (Gucciardi, 2004).

Merit-based undergraduate scholarships are only one of the many financial aid resources that universities make available to help students pursue their education. I have chosen to investigate adult students' access to these awards because merit-based scholarship allocation is based on only one variable, academic ability, and as a result if academic ability is consistent across the two age groups that I have chosen to compare (that is, less than 25 years and 25 years and older) and if scholarships are awarded solely on the basis of academic merit (see for example McMaster, 2005a; University of Toronto,

2004), then there can be no other variable associated with their allocation (that is other than eligibility criteria) that might explain any disparity in their distribution to adult students as compared to traditionally aged undergraduates.

To develop a sense of undergraduate scholarships allocation policies and to discover if any similarities in eligibility criteria exist across Canadian universities, I reviewed the financial aid websites of some Canadian universities. I randomly chose ten universities without regard to size, purpose, location, programs offered or total value of scholarships and bursaries.² I noticed that although each university sets its own eligibility criteria for its awards there were some commonalities among regulations.³ For example, many of the universities restricted scholarship eligibility to students with full-time status, and in the case of entrance scholarships, many also restricted eligibility to recent high school graduates or (for selected scholarships) also to students entering university directly from community college.⁴ Eligibility criteria in these forms restrict adult students' chances of being awarded an undergraduate scholarship because whilst the study patterns and pathway to university required by these eligibility criteria might reflect those traditionally associated with undergraduate education, they do not reflect the study

² The ten universities I randomly chose were: University of British Columbia, Queen's University, McGill University, University of Alberta, Memorial University, University of New Brunswick, University of Toronto, University of Western Ontario, University of Calgary, Mount Allison University.

³ The intention was not to compare the universities in any way but to get a sense of any eligibility criteria that were common to many or most Canadian universities, regardless of the size or purpose of the university or the value of scholarships and bursaries made available to undergraduate students. Not every university listed general eligibility criteria for these awards on their websites, but all listed criteria for individual awards. Where general criteria were not listed the specific criteria for awards were reviewed. The similarities noted are based on the examination of the information that was available at that time.

⁴ For example: McGill University specifies on its webpage that to be eligible for entrance scholarships students must be entering university for the first time and then lists those students who are **not** eligible for these awards. This list includes mature (adult) students regardless of whether or not they are entering university for the first time. See: <http://www.mcgill.ca/applying/scholarships/>

patterns (Bowl, 2001; Keast, 2000) and/or pathway to university (Haughey & Yore, 1983; O'Heron, 1997; Shale, 1999) of the majority of adult students. However, not all undergraduate scholarships are restricted to full-time students, some universities also offer scholarships to part-time students and because about 70% of part-time undergraduate students across Canada are adult students (O'Heron, 1997) these would appear to be more suited to the study patterns of adult students. However, the number of these awards and their value was often small in comparison to those offered to full-time undergraduates.⁵

My interest in adult students' access to undergraduate scholarships results from my own experiences attempting to access this form of financial assistance as an adult undergraduate student. When I read the eligibility criteria for undergraduate scholarships at the university I wanted to attend I realized that because I was not commencing my studies directly after leaving high school or community college, and because commitments in my life and a lack of financial resources made it impossible for me to study on a full-time basis, I could not qualify for any undergraduate scholarship available at that time. In contrast, when my 17-year-old daughter started her full-time undergraduate studies at the same university she was awarded a sizeable entrance

⁵ For example, because there was no mention of scholarships for adult students on the webpage I e-mailed the financial awards office at the University of Toronto to inquire where I might find details of scholarships suited to adult students. I was directed to: <http://www.apus.utoronto.ca/> This is the webpage of the Association of Part-Time Undergraduate Students at the University of Toronto. Listed on this page are all scholarships the Association offers to part-time students. The association offers 25 scholarships each with a value of \$300 to a total value of \$7,500. The University of Toronto awards \$7.3 million in undergraduate scholarships each year (see: <http://www.library.utoronto.ca/facts>).

scholarship, two awards from the provincial government⁶ that are available only to recent high school graduates, and a graduation scholarship awarded by her high school. As a result my daughter was able to pay her first year's full-time fees in total, buy all her textbooks, and still have money in the bank. I am really proud of my daughter and delighted that her academic abilities have been rewarded. However, when she received her scholarships I could not help but notice the many awards that were open to my daughter because she was entering full-time university directly from high school, and I could not help but contrast the ease with which these awards allowed her to pursue her studies with the financial juggling and struggling that had accompanied my own recent undergraduate years.

Kasworm (1996), in research that looked at university education from the perspective of adult students, found that many of the participants in her study had similar experiences to my own as they attempted to access undergraduate scholarships. The following are quotes from two participants Kasworm uses in her writing to highlight adult students' experiences:

The thing that concerns me most about the educational system is that it is not set up for the older student. And it begins with the ability to acquire a scholarship for example. They are given in mass to the younger [students]... There's about zero help for me to go get a scholarship, even though the same grade point average would give me one if I was twenty-two years old.

I've researched scholarships...in the library trying to find a scholarship that would pertain to me, that would help me. And everything was basically those SAT scores or...fresh out of high school or in their junior year and you're studying this and that... Couldn't find anything that

⁶ BC Ministry of Education Passport to Education and BC Ministry of Education Grade 12 Provincial Exam results scholarships.

would pertain to the older student, you know, thirty plus (1996, pp.55-56).

In her findings, Kasworm concluded that some adult students believe that “the financial aid system was set up to actively discriminate against adult students” (1996, p.55).

While this explanation might capture the annoyance that some individual adult students experience when they attempted to access university-administered scholarships, it does not offer an explanation of why opportunities for adult students to access these awards are restricted, why similarly restricted opportunities appear to exist in many different educational settings, or why these restrictions have been perpetuated over time. Such answers might be found in the works of theoretical writers who seek to understand the social systems underlying commonplace everyday practices. Although connecting the experiences of myself and other adult students who have expressed concerns about the limited scholarship opportunities available to adult students with the writings of social theorists might appear tenuous, if the unequal opportunities that adult students encounter accessing undergraduate scholarships are to be recognized as issues faced by many adult students within many different settings, then why this inequality occurs has first to be understood in its social context.

Thesis Outline:

The first chapter of this thesis has introduced the topic and explained my interest. The second chapter examines academic literature findings about adult students: their significance in university settings; the ways in which their lives differ from traditional

younger undergraduates; and the barriers that they face in accessing education. Then these literature findings are connected to the topic of the study through a framework for understanding how adulthood becomes difference when adults enroll in studies at an age that is not traditionally associated with undergraduate education, and also for understanding how student provisions, such as scholarships, that are commonly available to undergraduates might not be as readily available to adult students if the particular requirements of this group are overlooked in the allocation provisions. Drawing from Young's (1990) writings on difference the social construction of difference is discussed. And drawing from writings that examine approaches to formal equality and to substantive equality, how difference affects access to opportunities is examined.

Young (1990) argues that specific social groups are marginalized by social practices that go unnoticed in everyday life. This thesis links the practice of awarding undergraduate scholarships to the creation of a marginalized group, that is, adult students. And this thesis also links this marginalization to formal equality measures (that is practices put in place to provide equal opportunities (IWARA, 2001)) which may restrict opportunities to those who are different, and to substantive equality measures which attempts to address imbalance that occurs in formal equality provisions by recognizing that unequal access to equal opportunities can result from "the neutral application of formal rules" (LeRoy, 2003, p.21). The aim of this chapter is twofold: first it connects findings on adult students' difference to social theory writing, and second it quotes the voices of adult students themselves, and thereby provides insights into the experience of being an adult student.

The third chapter introduces the methodology that will be used in the research study of this thesis. This is a case study that looks in detail at one Canadian university's undergraduate community, scholarship provisions, allocation policies and the outcome of these policies. Findings from this case study are placed in context through comparison with findings from a survey of ten other Canadian universities that examines policies underlying allocation of undergraduate scholarship in these other settings. Case study was chosen as the methodology for this study because it is a means of exploring a single setting and collecting empirical evidence that might be generalizable to other settings (Yin, 1994). And, since this study will be examining in detail specific policies relating to undergraduate scholarship allocation at one Canadian university and then comparing policies for similarity through a survey of ten other universities, case study was a logical choice of methodology for this study. In this chapter the methodology, research design, data collection methods, analytical methods, and ethical approval process are each described.

The fourth chapter reports findings from the study in two parts: first findings from the case study university, and then findings from the survey of ten other universities. Findings from the case study university are presented in the form of three sets of data that each add to understanding of adult students' access to undergraduate scholarships at the university. The three data sets are: publicly available (from the case study university's website) statistical information that describes the undergraduate student population in numerical terms; verified (through interviews with university staff) publicly available

(from university's websites and from the university's calendar) information about the three classes of undergraduate scholarships (entrance awards, in-course awards, and part-time students' awards) offered at the university; and reports generated by the university for this study that show the numbers of undergraduates aged less than 25 years and those aged 25 years and older who have achieved grade point averages (GPAs) that would indicate they have displayed the levels of academic ability associated with scholarship awards, and the numbers of undergraduates aged less than 25 years and those aged 25 years and older who are recipients of each of the three classes of scholarships described in the first data set for each of the last five years.

Findings from this last data set are first reported as raw data and then, since adult students constitute a smaller proportion of the undergraduate population than traditionally aged undergraduates, they are reported in the form of chi-square statistical test results. Chi-square testing is used to determine whether or not adult students who won scholarships in each of the three classes of awards in each of the five years when data were collected came from the same population as the traditionally aged students who won scholarships in the same class and in the same year. If testing shows that the groups came from the same population then both age groups had equal opportunity to win each of the classes of scholarships in each of the years tested. If testing shows that they did not come from the same population, then members of one group did not have the same opportunity for success in scholarship allocation as the other. Grade point average marks are compared across the two groups and used to discover if any significant difference in success could be attributable to academic differences. Finally, findings from the

responses to the survey are reported to provide insight into the eligibility criteria used in undergraduate scholarship allocation at other institutions and to discover if findings from the case study university are generalizable to other Canadian university settings.

In the final chapter of this thesis key findings are discussed: first in relation to the case study university, then in relation to the ten other universities surveyed, and finally in relation to the literature review and to the theoretical framework of this study. This discussion leads on to recommendations for change. Limits to the study, implications of findings, and directions for further research are also outlined. This thesis addresses the question: Do adult undergraduate students have equal opportunities to access university-administered undergraduate merit-based scholarships awards? In addressing this question it is anticipated that this thesis will raise awareness of adult students within undergraduate education, of the issues they face in their studies, and of the opportunities they have to access undergraduate merit-based scholarship awards.

Chapter 2

Literature Review

This review of academic literature first describes the significance of adult students as part of undergraduate communities, next highlights the ways in which adult students' lives often differ from traditionally aged undergraduates, and then draws attention to the barriers that adult students might face in accessing university education. Finally, a theoretical framework for understanding the topic of this thesis is developed that examines how difference is socially constructed and how difference can restrict access to opportunities. This review of literature draws extensively on qualitative research and quotes some stories of the adult students who participated in the research. Qualitative research findings provide insights into the experience of being an adult student that cannot be achieved through the type of quantitative research used in this thesis.

Significance of Adult Undergraduate Students:

Adult students' participation in undergraduate education has grown steadily since the end of World War II (Bowl, 2001) for many reasons. These include: the decline in the birth rate following the post-war baby boom period and the subsequent encouragement of non-traditional students in university education (Bowl, 2001); changes in technology that resulted in the creation of new jobs requiring new skills (Kasworm 2003); changes in the level of skills demanded by employers at all levels with resultant increased demand for retraining (Kasworm, 2003); increased participation of women in

the labour force (Bowl, 2001); the growing importance of qualifications (Lynch & Bishop-Clark, 1994); increased understanding of post-secondary education as the gateway to career opportunities (Reay, 2002; Schuetz & Day, 2001); and increased recognition that post-secondary education is no longer solely a privilege of the elite, but rather a mass entitlement (Reay, 2002).

There is a scarcity of research documenting growth in the numbers of adult students at Canadian universities over this time period, but it is possible to draw some inferences about their growing presence from research completed on part-time university students because the majority of adult undergraduate students at Canadian universities have been identified as part-time students (O'Heron, 1997). Keast (2000) studied the part-time students at Canadian universities and reported that the proportion of part-time students had increased from 14% in 1939 to 38% in 1979 (a proportion that he states has remained constant since that date). Keast also reported that: "by 1990, the proportion of part-time undergraduate university students 25 years of age or older had reached 75%, with more than 50% being 30 years of age or older" (2000, p.60). O'Heron (1997) gave some indication of the numbers of adult undergraduates at Canadian universities when he stated that in 1995 there were 85,000 adult full-time undergraduates and 163,000 adult part-time students at Canadian universities and that these numbers represented 17% of all full-time undergraduate students in Canada and 70% of the all part-time undergraduate students.

Keast's (2000) and O'Heron's (1997) findings about the high proportion of adult students who study part-time is similar to findings of research completed in the USA. For example, Horn, Peter and Rooney (2002) reported statistics compiled by the US National Postsecondary Student Aid Study that revealed that 57% of undergraduates in their thirties and 70% of those aged 40 or older attended university as part time students and contrasted these findings to ones that showed that 27% of undergraduates aged 19 to 23 years attend university as part-time students. These figures indicate that adult students represent a significant proportion of university undergraduate populations and also that adult students comprise the majority of part-time undergraduate students.

However, despite these numbers researchers have noted that adult students are often "neglect[ed]...institutionally invisible, marginalized...taken for granted...or systematically ignored by the field of higher education" (Sissel et al., 2001, p.18). Some researchers have noted that the names used to describe adult undergraduates, such as "non-traditional students" serve to marginalize adult student and to suggest "their presence on campus somehow represents a daring departure from business as usual" (Brookfield, 1999, p.10). Kasworm (1993) believes the term "non-traditional students" contributes to a lack of prominence of adult students on university campuses. She deconstructed the phrase to mean "non-normative...and outside of the dominant cultural circle" (1993, p.162). The dominant cultural circle of university education is defined by Read, Archer and Leathwood (2003) as: "the (largely unwritten) rules of the game of university life... [the]academic 'culture' that influences (and is influenced by) the ways in which students and lecturers think, speak and write in the academy" (2003, p.261).

Read et al go on to note that: “academic culture is not uniformly accessed or experienced... [instead it] reflects the dominant discourse of the student learner as white, middle-class and male...students from ‘non-traditional’ backgrounds are... disadvantaged by an institutional culture that places them as ‘other’”(2003, p. 261).

The “other” denotes relational differences where difference is linked to inferiority (Young, 1990). For adult students being the “other” in university settings, where academic meritocracy is an assumed given, attendance at an age that might indicate a past educational history of dropping out of school, withdrawing from previous university studies, or never having attended university before suggests that adult students are former educational failures, not university material and not meritorious (Sissel et al., 1997). As a result, some researchers have found, adult students are often overlooked and neglected within higher educational settings. And they believe that such labels as “non-traditional” (Brookfield, 2001) or “non-standard” (Osbourne et al., 2004) contribute to adults being overlooked or neglected because they define adult students as marginal and they do not “provide respect and dignity for adult qualities” (Sissel et al., 2001, p. 19).

Sissel, Hansman and Kasworm (1997) detected the overlooking of adult students in the responses of university administrators to terms used to describe adult students. Sissel et al. stated that regardless of whether adult students were referred to as “adult” or “non-traditional”, administrators at the university they studies challenged these descriptors and through their challenges subsumed adult students into the larger student body where they became invisible as a distinct group. Sissel et al. commented that

administrators claimed that “adult” (as a term applied to over 25 year olds) was demeaning to those under 25 years, and that the term “non-traditional” could include most of the university’s student body (women, minority students, first-generation college-bound students, Aboriginal students, adult students, students who are parents, part-time students, students with disabilities, international students, working students etc.). Sissel et al. noted the contradictory nature of the administrators’ reasoning: since age as a demographic was ignored by the educational institution they studied (and as a result the university had no way of knowing whether or not any differences resulted from increased age) administrators were adamant that no difference existed: “they were “not different” and had no different needs.... In classic circular logic, because no differences had been discerned, none existed” (1997, p.5).

But adult students are different (Fairchild, 2003; Wilson and Rosen, 1999). And not only are adult students different from traditional undergraduates because of their age they are also diverse as a group in terms of their age, sex, ethnicity, full or part-time status, family commitments, employment status, and/or past educational experiences (Osborne et al., 2004). Some researchers have sought to highlight the differences of adult students by developing profiles of them in the educational institutions they are studying (Campbell, 1993; Kasworm, 2004; Murphy, 1998; University of Alberta, 1983; Wilson and Rosen, 1999). Whilst the findings of these researchers vary from setting to setting, some commonalities have been identified. These include findings that indicate that adult students are more likely to be women than men (Murphy, 1998; Penglase, 1993; Thompson, 1997); that the majority of adult students are aged under 40 years (Bates &

Norton, 2002; Cross, 1986; Haughey & Yore, 1983; Murphy, 1998; University of Alberta, 1983); and that adult students are likely to be engaging in their studies to improve their employment prospects (Campbell, 1993; Haughey & Yore, 1983; Horn et al., 2002; Murphy, 1998; University of Alberta, 1983).

One aspect of the difference that is common to all adult undergraduate students is that they have not entered university directly from high school. Instead they have entered from some point in their lives where they have decided to return to education. Shale (1999) examined the previous educational experiences of adult students in his quantitative research, and developed sub-groups for his study based on the differing pathways adult students had taken to university. While the qualitative researchers studied for this literature review have not made use of Shale's sub-group classifications, when reading the stories of their participants quoted in their work it is possible to identify some similarity in past educational histories that could mirror the classifications developed by Shale. Although these stories indicate similarities between adult students they also highlight the diverse range of past educational history that adult students bring to their studies and go some way towards dispelling notions of past educational failure often associated with the return of adults to education (Sissel et al., 1997).

The sub-groups Shale identified in his research are: enrolled in university for the first time; enrolled in university to complete studies previously commenced but interrupted; and enrolled in studies to complete further undergraduate studies after previously completing an undergraduate degree or equivalent. The following are the

voices of adult students, quoted by qualitative researchers, describing why they have decided to enrol in university education for the first time:

They did not think I was smart and would often say so... They convinced me I would turn out to be nothing. It did not occur to... [my mother] that I should go to college; instead I was supposed to work and to help her take care of the home financially... I started dreaming about becoming a teacher... My husband convinced me to... give it a try (Schrader, 2004, p.122).

When I left school I thought [university study]...was just hard work. It wasn't what I wanted to do. Sixteen yeas later I think its time I got a proper career. So I'm going to university...to get my qualifications" (Osborne et al., 2004, p.304).

I wanted to set an example for my kids. Nobody in my family has been to college or has a college degree (Widoff, 1999, p.21).

My first memories of education were ones of encouragement. I remember my grandparents saying I was smart and I could accomplish anything... By the time I was in junior high school I was a bonafide nerd. The kids would tease me about my hair and how I didn't have up-to-date clothes... Life as a learner was not good... I believe this is the reason for my declining interest in learning for many years. High school was just a place to go... At the age of 18 I got pregnant... It's been a while now and... I've decided to give back to the community and become an educator. I'll be the teacher who cares when no one else will (Schrader, 2004, p. 123).

I had always wanted to go to university but it was not part of my family's thing for girls to do. I mean the idea just never came up. My father would not have helped me anyway. It was just something that was never spoken about. You just knew women did not go to university. It was "go to work", and I picked secretarial. I got married. The opportunity wasn't there for me (Campbell, 1993, p.11).

The following are the voices of adult students, quoted by qualitative researchers, who have returned to complete studies they started at a younger age:

When I finished high school, I went to university because I really did not know what else to do. I went full-time one year, then full-time

somewhere else for two years.... I wasn't studious. I didn't care about being in university. I was more interested in the nightlife. So I didn't do well. It was a waste of time. I slept in. I didn't go to classes (Campbell, 1993, p.10).

I was full-time at university, at medical school... [When my] little girl... [was born with] spina bifida... I didn't want to go out full-time and leave my little girl because she was so poorly (Osborne et al, 2004, p. 299).

I started university...when I was younger...teachers' college right out of high school. I was just one of those kids who wasn't into doing it. I decided I didn't want to do it right then, so I quit and found a job (Campbell, 1993, p.10).

Elsbeth [had previously] dabbled in university-level distance study... [When her] marriage broke up ... in her 50's ... she embark[ed] on a full-time BA... "It's important for me to get a degree to show my ex-husband that I could do it because he always thought I was dumb" (Davey & Jamieson, 2003, p.275).

It is more difficult to find qualitative research that recorded the voices of members of Shale's third sub-group: adult students who had previously completed university education and were returning to complete further undergraduate studies. My own story provides such a voice. I returned to university to complete further undergraduate study after having completed (straight from high school) a degree-level program that trained me for a specific profession. After graduation I worked in my profession for some years but when I moved to Canada I could not find employment in my field. Instead I stayed home to care for my children. When my children were all at school I returned to university to gain a second qualification with the hope of re-entering the workforce. During my studies I have met other adult students who are completing second undergraduate degrees for many reasons but I have notice that this group is not so evident in qualitative literature even though quantitative research findings reveal we

constitute a significant proportion of adult students: for example Schuetz & Slowey (2002) found adult graduates completing further undergraduate study in most of the ten countries they studied and Haughey & Yore (1983) found that 40% of their part-time off-campus respondents and 23 % of their part-time on-campus respondents already held one degree and were registered for further undergraduate courses.

How Adult Students Differ:

Kasworm (2003) in her research findings believes that the differences between adult students and more traditionally aged students are apparent right from the time of enrolment in their studies. Kasworm's view is that when adults students enroll in university this action does not follow the smooth transition from one phase of education to another of traditional students, but instead enrollment in university education for adult students often follows a traumatic life experience, or years of thinking and planning, or a combination of both. Kasworm examined adult students' reason for enrolling in undergraduate studies and identified three life-context motivators that had the result of causing adult students to commence university study. These are: personal transition and life changes motivators; proactive life planning motivators; and mixed motivators.

Kasworm defines personal transitions and life change motivators as the changes that "foster new understandings or perspectives in individuals or present conditions in which college is viewed as necessary" (2003, p3). These would include "divorce, children entering school, a recent job loss, or a denied job promotion due to the lack of a

college degree (2003 p.4). This motivator was reflected in findings of Campbell (1993) who studied adult women undergraduates at Cape Breton University College. Campbell quoted the following participant describing her decision to enter university in terms that show this decision resulted from personal transitions in her life:

I wouldn't have come to college had I stayed in the marriage... After the separation I knew, "you're on your own". And I have two kids. I was working but I *knew* I had to better myself. I knew I needed a better job, better pay, because from here on in I support two boys on my own. So I started thinking about furthering my education (1993, p.6).

By contrast, proactive life planners spend "several years...thinking and strategizing" (Kasworm 2003 p.4) about their return to education and learning about resources to help them achieve their goal. Their entry into education is well thought out and planned for. A study completed by Davey and Jamieson (2003) of the pathway early school leavers took into university education in England and New Zealand described the life of one of their participants in a manner that illustrates this purposeful motivator:

Alan was...born in the slums of Bristol...he had to leave [school] at 16... He worked for years [and took] work related evening courses... He then obtained a place at RADA [Royal Academy of Dramatic Art], where he was for two years... at the age of 31 he applied to medical school... having taken 'O' levels in six months and three 'A' levels in a year... He was aware of the barriers which his background could present. Thus his time at RADA enabled him to get rid of his Bristol accent and he is convinced that that helped him get into medical school (2003, p.272).

The final group of motivators Kasworm identifies is mixed motivators resulting from a combination of life changing incident and protracted planning. Kasworm found that adults who were motivated to enrol in college by the combination of both life

transitions and proactive planning were more likely to have attended university in the past and were returning to complete a program of study previously interrupted, for career enhancement, or as a complete change of career. She felt that “their current goals and motives reflected both a changed perspective and enhanced complexity from their earlier beliefs” (2003, p.6). This mixed motivator was my own experience, I planned to return to education when my youngest child started kindergarten, but when she did start school I did little to realize my plans for almost three years. Then, when my father died suddenly and unexpectedly, I started to see time in an entirely different way and I quickly enrolled in my studies.

The most commonly identified differences between adult undergraduates and traditional undergraduates by researchers are that adult students are more likely to work while they study and that adult students are more likely to be financially supporting their own dependents (Haughey 1983; Home, 1997; Kasworm, 2003; Wilson and Rosen, 1999). Kasworm (2003) reported findings from US National Centre for Education Statistics completed in 1995 that showed that that almost half (46%) of adult student participants worked full-time (over 40 hours a week) while studying, and another quarter worked more than 20 hours a week. However, the income of the majority of adult students was not high: 28% earned less than \$10,000 each year, 43.4% had incomes between \$10,000 and \$29,999 and only 29% had incomes of \$30,000 and more (Kasworm, 2003). The US National Centre for Educational Statistics reported findings that indicated adult students were most likely to fund their education from limited discretionary family income, as only 8.6% of adult undergraduate students received any

financial help from their employers to finance their studies (Kasworm, 2003). Funding university education from limited income mirrors my own experiences as an adult undergraduate student. As a member of a six-person single-income family I could only afford to fund my studies at the rate of one course or two courses a semester paid for out of the family allowance I received at that time. As a result it took me five years to complete a two-year undergraduate program.

The other most commonly reported difference between adult students and traditionally aged undergraduates is that adult students are more likely to be supporting dependents (see for example: Fairchild, 2003; Murphy, 1998). Kasworm (2003) reported that 53% of adult students supported dependents other than their spouse, and that as adult students age there is an increased likelihood that they will be supporting other dependents. Kasworm (2003) found in the age group 24-29 years 25% of students had dependent responsibilities, and in the age group 30-34 years 69% of students had dependent responsibilities. In addition Kasworm (2003) reported that 29% of adult students are single parents, and that these students are mostly women aged between 30 and 40 years.

As a result of combining education with work and family responsibilities the majority of adult undergraduate students are enrolled in part-time studies (Fairchild, 2003; O'Heron, 1997). The 1991 US National Household Education Survey found that on average adult students enrol in 2.8 courses a year, with two-thirds of adult students taking only one or two courses each year (Bosworth & Choitz, 2002). Bosworth and

Choitz (2002) compared rates of study with household income and found that whereas it might seem that because adults are employed during their studies they would be able to afford the cost of their education, this was not the case. They found that families of four earning \$35,000 or less a year earned just enough to support themselves, and as a result the cost of university fees for even a modest number of courses was often beyond their reach. When Boswell and Choitz's findings are considered in comparison with findings reported by Kasworm (2003) that showed 61% of adult students have family incomes less than \$30,000 a year, another reason why the majority of adults study part-time might be discerned: they do not have the money to pay full-time fees.

For adult students, balancing the demands of work and family results in additional stresses associated with participation in university education. Home (1997) examined a group of Canadian adult women university students with both family and employment responsibilities and found that their constant juggling of roles was stressful due to the fact that both universities and families are "greedy institutions... [demanding] exclusive loyalty, virtually unlimited time commitments, and high flexibility" (1997, p.335). Recognition of additional stress that results from the multiple roles in adult students' lives was mirrored in a study of students with families (Whittington, McAlister, Apted, & Dale, 2004). This study, which highlighted issues experienced by students who are parents, described stress in the life of one participant (a full-time student and a single mother of two young children) as resulting in her having two lives both filled with guilt:

With so much to do...[she] often felt that her children were getting too little of her attention and affection but she couldn't find a way to create more time or energy to go around. But she needed time to study because the demands of the institution were contained in policies such as that on

late papers, which meant that some professors penalized [her late papers] two grades (2004, p.10).

The study also illustrates the unique nature of the stresses individual students' experience as adult students. For example one participant spoke of: "being nine months pregnant with a two-year old and I wrote my exams" (2004, p.23).

Lavell (1998), writing about her undergraduate experiences, provides a vivid portrayal of the complexities of an adult student's life that result from balancing demands of family and education. In the following account Lavell describes how she came to recognise that family responsibilities caused her life to be different from the lives of her fellow undergraduates. Lavell recounts a situation that occurred when she was discussing being overloaded at the end of term with a group of fellow students. One student interrupted the conversation to bemoan the fact that her mother had given her "cheese again" in her lunch.

I was contemplating the larger scenarios in which we were all struggling to survive exam period. For me, going to class, student teaching, writing two papers and preparing for three exams all resided together in a large but relatively manageable compartment of my life... I was thinking about the foundation of work I do just to keep my children and myself surviving whilst I go to university... every term...many hours would be spent filling out application forms, re-application forms and sometimes appeals forms for the several bureaucracies with which I had to deal: Student Aid; government subsidized day-care; government subsidized housing; Child Related Income Support; and Shelter Allowance for Family Renters, among others. Many more hours would be spent collecting, photocopying and paying for all the required documentation for these applications... Planning for and getting my various children to their various daytime arrangements, either daycare or school, and then getting myself to class...mostly on foot pushing a baby in a stroller... After this regular morning trek, the actual work of being a university student often seemed like a holiday... Four o'clock until after ten, I was a mother again. Doing supper, playing with my kids, helping with their

homework, doing art, story time, chats, complaints and fights. Life. Most nights I had my own homework... The day of my shift of perspective, when I began to notice the difference in the situations that myself and many of the other students were describing as being "swamped"... I began to think about where the other ["cheese again"] women...[was] coming to university from and... going back to...driving home to a house someone else was paying for, a house that someone else cleaned and someone else maintained... eating a supper that someone else had cooked... having a space to do homework uninterrupted...[sleeping] in a bed that someone else had made for her (pp.195-196).

Fairchild (2003) lists many of the ways that adult student can differ from traditionally aged undergraduates discovered through academic research. These include findings about other activities in adult students' lives (included caring for children, caring for elderly relations, caring for family members with disabilities, community involvement, and volunteer work) that Fairchild notes result in less time being available to spend on campus. Fairchild (2003) also notes findings that indicate that adult students are present only for their classes; that they leave immediately after class; and as a result they do not develop a social life associated with their university education.

This last difference is fundamental in consideration of university scholarships. Scholarship awards that "recognize and promote academic excellence among the student body" (University of Toronto, 2005) not only reduce the need for students to combine work with study (Desjardins et al, 2001) but they are thought to benefit students by freeing up time to allow students to become more involved in campus life. Increased involvement in campus life is supposed to be beneficial to students because it is thought to be linked to higher academic achievement (Winston, 2003). Involvement theory holds

the view that the greater the level of students involvement in campus life the greater the learning and personal development (Graham and Donaldson, 1999). Graham and Donaldson (1999) looked at adult students' involvement in their university education to determine if involvement theory applies equally to adult students as to traditionally aged undergraduates. In their findings Graham and Donaldson found significant differences in involvement in college clubs, college organizations, and college sponsored events between adult students and traditionally aged students but equal or greater growth across all areas of academic and intellectual development. They concluded that despite adult students' lack of involvement in campus activities, adult students learn and grow intellectually as much as, or more than, younger students during their university undergraduate education.

Graham and Donaldson's (1999) findings support findings from Kasworm's (1990) review of over 300 studies of adult students learning outcomes in higher educational settings. Kasworm discovered that adult students did as well or better than traditional-age students based on grades and aptitude/content test performance measures. And it was not only adult students themselves who benefited from their educational experiences, a quantitative study by Darkenwald and Novak (1997) showed that the greater the proportion of adult students within classrooms the higher the aggregate average performance of the class in total as measured by class grades. Donaldson (1999) highlighted the benefits that are derived from adult students presence in classroom when he stated how life experiences and the "rich mental schemas" (1999, p.27) that adult bring to their studies enables adult students to draw on previous experiences and

knowledge to make meaning on new learning in ways that can be connected to real-life, and that this allows for a more authentic educational involvement. Not surprising then that the presence of adult students within classrooms benefits all students who are present (Darkenwald and Novak, 1997).

But it is not easy for adult to see themselves as beneficial presences in educational settings: this only develops over time. On entering college adult students frequently report rusty study skills, low self-confidence, or fears about returning to college (Donaldson, 1999). However, during their studies they come to hold very strong beliefs about themselves within higher educational settings: they grow to see themselves as the ideal student and this personal growth occurs despite any ambivalence they might have initially experienced about their participation in university education (Kasworm, 2004). Kasworm (2004) found the adult undergraduate students to be serious, committed and present as a life choice. They felt they influenced their studies through their contributions to the classroom: they attended classes regularly, took their studies seriously, were attentive in class, thorough in their assignments, and strove to produce high quality work rather than just being content to get by. One of Kasworm's participants is quoted as saying: "I think when adults come back to school they're there really to excel" (2004, p, 13). Kasworm's conclusions were based on adult students' view of themselves but similar findings have resulted from quantitative research. For example, Richardson (1995) quantitative study found that adult students, "rather than their younger counterparts display the learning characteristics which...higher education has purported to be striving to develop in students" (1995, p.12).

Kasworm's finding that adult students grow to see themselves as ideal students is mirrored in Campbell's work (1993). Campbell discovered that most of the women in her study recognized they had changed during their university education. Not only had they become more self-confident but also, as a result of obtaining good grades and being complimented on their work, they started to see themselves as "college material". They also recognized that they had become:

More competent...most confident academically and socially...more tolerant...more challenging...more self-reliant... [And despite] whatever anxiety they themselves had suffered [during their studies], there was, they said, no going back. They would not allow the self-development they had just begun to experience to be thwarted (1993, pp.23-34).

Research has therefore indicated that adult students are meritorious students even though they may face many barriers during their studies because of the differences in their lives.

Barriers Adult Students Face Accessing Education:

The most commonly identified barrier to adult participation in post-secondary education found in academic literature is lack of money (Bates, 2002; Bowl, 2001; Campbell, 1993; Fairchild, 2003; Haughey & Yore, 1983; Lauder & Cuthbertson, 1998; University of Alberta, 1983; Whittington et al., 2004; Wilson & Rosen, 1999). Unlike traditionally aged undergraduate students adult students' engagement in post-secondary education is one activity among the many that make up their lives (Fairchild, 2003). As a

consequence available money often has to be spread over a wider range of uses than is normal for traditionally aged students: these include mortgage payments, taxes, supporting dependent family members, and child care costs (Bates, 2002; Bowl, 2001; Fairchild, 2003; Lauder and Cuthbertson, 1998; Whittington et al., 2004). A survey conducted by Junor and Usher (2002) for the Canadian Millennium Scholarship Foundation on student expenditure found that students with dependents and adult students reported the highest expenses for accommodation, food, debt, utilities, transportation and medical expenses compared to traditionally aged students, and in addition one-fifth of students with dependents reported daycare costs. One of the participants in Campbell's (1993) study lists the sort of demands on her money that are a normal to adulthood but yet quite different from the financial demands more traditionally associated with undergraduate education: "The fact is we have an older home we're renovating, we have the house, the kids, a car, the bills, and as the girls get older they cost more to maintain" (1993, pp.55-56).

Junor and Usher (2002) in a Canadian Millennium Scholarship Fund study listed ways in which university students finance their education as follows:

The top four sources of educational funding drawn upon by students were: personal savings (52.2% of respondents), money from parents (45.0%), government student loans (32.4%) and government student grants or bursaries (17.6%) (2002, p.1).

Junor and Usher do not expand on this information to indicate if adult students make use of these same four sources to finance their education. My own experiences as an adult undergraduate might indicate that they do not. As a single income family of six we had no savings I could draw on to finance my studies; my father died just before I started my

studies, my mother was in a nursing home and was therefore not able to provide any financial assistance; I felt I could not take out a student loan because I knew that if I did not get a job after graduation I would have no way of repaying it; and, because I could only afford to complete one or two course a semester, I was a part-time student and did not qualify for any scholarships or bursaries that were available at that time. Also, I discovered that funding options often associated with undergraduate education did not offer the same opportunities to me as an adult student since any additional income derived from part-time (and most probably low-paid) employment would be significantly reduced, if not entirely wiped out, by child-care expenses and I was not eligible for on-campus summer employment opportunities because of my age.⁷

Research has shown that even when it appears that adult students should have access to the same sources of funding available to younger students, because of policies governing these sources of funding the benefits to adult students might be limited. For example, on the subject of student loans Whittington et al. (2004) reported that regardless of the number of children in a family the maximum student loan that a student with dependents can obtain is \$14,790 for eight months of study and \$22,185 for 12 months of study.⁸ To qualify for a student loan a student has to take at least three courses a semester. Out of the maximum amount borrowed a student/parent would have to pay for her/his tuition fees and books as well as housing, groceries, childcare and living

⁷ The Summer Career Placement Program, a federally funded employment program that subsidizes all summer on-campus jobs at the university I attended, restricts program eligibility to full-time students aged between 15 years and 30 years: I was older than 30 when I enrolled in my studies (see HRDC webpage at: http://www.hrsdc.gc.ca/en/epb/yi/yep/programs/scpp_bc.shtml Accessed 1 September 2005).

⁸ This information is available on the BC Student Loans web-site. See p.19 General Information British Columbia Student Assistance Program at: <http://www.aved.gov.bc.ca/studentervices/student/gionline.pdf>

essentials for her/himself and her/his family. Although limits to the amount of student loans might prevent build-up of excessive financial liabilities they also have the effect of relegating some students with families (particularly families with no other sources of income, limited other sources of income, and/or multiple children) to poverty⁹ at the same time as they build debt to be repaid after graduation. In writing about her experiences as an adult undergraduate student at Queens University and a single parent Lavell (1998) highlights how limits on student loans had an impact on her life and her family during her studies:

My income in student loans and bursaries is \$10,395, so that after paying my tuition and books, my children and I are left with \$7,900 to live on. We are living this year, I am thinking, on less than 40 percent of the bare bones income necessary for survival (1998, p.198).

Lack of money is a constant worry for some adult students. Murphy (1998) found that many of the adult students in his study talked about difficulties concentrating on study when they were worried about how to pay for the basic necessities of life. He found that constant money worries often resulted in students withdrawing from their programs. As Fairchild (2003) explains:

Time and energy spent trying to 'make ends meet' can drain the most dedicated student... Although some variables can be negotiated, income levels cannot. The basic needs of the family like food, and rent or mortgage, take priority (2003, p.12).

⁹ Stats Canada Low Income Cutoffs for 2002 for urban area population size 30,000-99,000: 1 person family \$16,407; 2 person family \$20,508; 3 person family \$25,505; 4 person family \$30,875; 5 person family \$34,512; 6 person family \$38,150; 7 or more person family \$41,788. Available at: <http://www.statcan.ca/Daily/English/030205/d030205a.htm>

Other researchers used adult students' own voices to explain how money worries (and the minute details associated with these money worries) become a preoccupation for some adult student, taking time and energy away from other activities:

Every day I was writing up budgets trying to get this out of that, the amount of time I spent fiddling around with money was ridiculous (Whittington et al., 2004, p.11).

It's eight dollars for a locker and then there's a lot of handouts you have to get photocopied. That's ten cents a copy. I'm after spending twenty-five dollars so far on that. Then the odd time you like to have something to eat here. And your transportation... I can't afford a babysitter (Campbell, 1993, p.54).

Increased access to scholarships could relieve much of the pressures placed on adult students by money worries. I discovered this myself when I commenced my graduate studies and was awarded a Fellowship that paid my fees. I could study on a full-time basis free from constant financial juggling and as a consequence I was able to relax and enjoy my educational experience. The changes in my life that resulted from this scholarship were remarkable and as a result it is easy for me to see how scholarships lighten the load of education and free up time for campus interaction. DesJardin, Ahlburg, & McCall (2002) state that scholarships "help students by allowing them to work less than they would do otherwise [because] work is thought to compete for a student's study time" (2002, p.654). In their study, DesJardin et al. (2002) looked at various funding options available to undergraduate students through financial aid (student loans, grants, bursaries, scholarships, work-study, and employment on campus) and compared each with rates of student attrition at universities. They found that scholarships had the greatest impact on students' ability to complete their studies, and that

frontloading scholarship aid (in the form of entrance scholarships) significantly increased students' persistence in completing educational programs.

Much of this discussion of barriers faced by adult students has been concentrated on financial barriers. This has occurred so that the need of adult students for scholarship funding can be highlighted. However, even though financial barriers are most often mentioned in research findings they are not the only barriers that adult students negotiate in their education, or in trying to access their education. Patricia Cross (1986) identified three classes of barriers faced by adult that are most often cited in adult education literature (for example: Fairchild, 2003; Home, 1997; Murphy, 1998; Wilson and Rosen, 1999). These are dispositional, situational and institutional barriers (Cross, 1986). Cross defines dispositional barriers as those that "relate to attitudes and self-perceptions about oneself as a learner": being too old; lacking confidence in academic ability; lacking energy or stamina; being tired of schools; and hesitant to make the commitment. She defines situational barriers as "those arising from one's situation in life at a given time": cost of tuition, books, child-care; not having enough time; home responsibilities; job responsibilities; lack of child-care; lack of transportation; lack of a place to study; opposition of family and friends. And she defines institutional barriers as the regulations and practices put in place by universities and colleges themselves that serve to: "exclude or discourage adults from participating in educational activities – inconvenient schedules or locations, full-time fees for part-time study, inappropriate course of study... too much red tape" (1986, pp.98-99).

Research findings have demonstrated that many of the dispositional and situational barriers that Cross (1986) identified are successfully negotiated by adult students either before they commence their studies or shortly afterwards. For example, Kasworm (2004) describes how her participants overcame dispositional barriers during their studies to the point where they saw themselves as "the ideal student" (2004, p.12). Campbell (1993) also found that adult students recognized how they had changed so much through their studies that they felt they could not go back to their old lives. And Wilson and Rosen (1999) discovered that their adult participants had negotiated many situational barriers in order to commence their studies. For example, they had:

Expected to hear from women undergraduates about unmet child care needs...[but} were surprised to find that most women had their child care arrangements well-organized and in place before they embarked on university studies (1999, p.353).

However, there appears to be a dearth of literature highlighting adult students' successful negotiation of institutional barriers. But there is some indication that institutional barriers do block adult students. For example, Kasworm (1996) quotes one adult student's story about trying to negotiate barriers relating to financial aid:

I find...adult students kind of in a limbo when it comes to financial aid, 'cause we're put through the same criteria that they have for kids. The other day in school I was told by financial aid officer, 'Well, you're supposed to have saved half of the money you made to put aside for education' I said, 'Wait a minute, how could you possibly save half of what you made when it took all of what you made to pay [for his family]' - [The financial aids officer remarked,] 'Well, you know, we base this on the fact that if you're making money--your parents are paying your expenses and everything and you don't have any living expenses to pay--so you got to put half of your money away for education.'.... So a lot of the criteria for financial aid is built around a kind of fresh out of school... staying with your parents (1996, p. 56).

One reason why there may be a scarcity of literature on adult students' and institutional barriers is that institutional barriers are so hard to see. My own experiences as an adult undergraduate student have led me to believe that such barriers do not present as institutional barriers *per se* but instead as failures on the part of the individual student to match the criteria required by a policy. When institutional barriers are encountered, I suggest, adult students are apt to see their own failure to meet the eligibility criteria first rather than the barriers that has been created for them. And because policies are distant from the individuals and outside the sphere of any one individual to change (be it administrator or policy recipient) the adult student takes on her/his failure to meet the criteria as the problem (and then tries to figure out either how to make her/himself fit the policy criteria or, alternatively, to figure out how to do without the provisions that the policy controls) rather than recognize that s/he has restricted access to the provisions. I suggest that this occurs whether or not an individual student is aware that an institutional barrier is in place. Thus it could be suggested that adult students' access to university services that are restricted through institutional barriers become a personal concern for individual students rather than a concern for the institution.

Policies that act as institutional barriers to adult students may do so because they fail to recognize adult students' difference from the traditional notion of undergraduates. (The traditional notion of an undergraduate being a young, single, and full-time student who attends university straight after high school - Kasworm, 2004; Shale, 1999; Winston, 2003.) By overlooking adult students' differences policies developed with the traditional undergraduate in mind help to define university education as a young person's activity

and causes adult students to perceive themselves as “imposters” within campus settings (Brookfield, 1999, p.11). This perceived sense of being an imposter may in turn make it difficult for adult students to raise issues they may have about institutional barriers because they do not feel they do not have a right to complain since they do not think of themselves as legitimate students. As Sissel, Hansman, and Kasworm (1997) state:

The voice and image of adult students is not integrated into the ethos of the campus. Most collegiate institutions do not view their student population as older, married, and working. Whether it is admissions information, webpage discussions, or catalogue descriptions, adult students are not part of the descriptive landscape published by higher educational institutions... Most campuses work on the assumption of a captured audience targeted to residential youth lifestyles... Colleges and universities also assume that they are interacting with youth in transition to adulthood; thus, attitudes and behaviors of administrators, support staff, and faculty, as well as policies and procedures of these institutions, are frequently condescending to adult students and do not take into account adult lifestyles and adult life complexities.... In the context of higher education privilege is constructed around notions of youth (1997, pp. 20-21).

Framework for Understanding:

One way to understand the mechanisms through which adult students are “impostors” in the university system as undergraduate students is through the concept of difference. Theoretically, difference has received much attention in recent years. Some writers deal with manifestations of difference by focusing on understanding of structural power: the asymmetrical relationship of power and dependency within social settings (Cohen, 1989). Young’s (1990) notion of difference is concerned with relational difference: the differences that result from variation in heterogeneity that do not act “as a

description of the attributes of a group, but as a function of the relations between groups and the interaction of groups with institutions” (1990, p. 171). Young uses “difference”, a concept she defines as meaning “not absolute otherness” but rather “a lack of sameness” (1990, p. 98), to describe how relational differences emerge within social settings and how the marginalization of some members can occur. For adult students, engagement in university studies at an age not normally associated with undergraduate education makes them different. In her writing Young (1990) provides understanding of how individuals are categorized within social groups and of the way in which some individuals are relationally different from other members of groups results in the exclusion of the relationally different group members through everyday practices and how these practices are perpetuated over time.

Young (1990) asserts that inequality of social opportunity is the result of oppression; a term that she maintains makes sense of social experiences and encapsulates inhibitions encountered by individuals. Young believes that oppression can be structural and as such it results not from the effects of tyrannical power but rather from “everyday practices...embedded in unquestioned norms, habits...[and] unconscious assumptions” (1990, p.41). She suggests structural oppression within institutions results from “the assumptions underlying institutional rules and the collective consequences of following those rules” (1990, p. 41). Young draws attention to the ways in which structural oppression occurs in everyday social interactions that result in benefits being directed towards one group and not to another. The allocation of undergraduate scholarship provides an example of Young’s theory: rules governing the allocation of these awards

are applied equally to all undergraduates however, some who meet the academic standard but cannot meet the eligibility criteria are denied access to the awards. And the inherent unjustness of excluding some people access to these merit-based awards through eligibility criteria that have nothing to do with academic merit goes unnoticed and unaddressed in university communities because the rules that govern the allocation of scholarships have been followed.

Young provides understanding of institutional structural oppression in her writing about the formation of social groups and her notion of cultural imperialism. Young describes how people are “thrown” into the social groups where “identities are defined in relation to how others identify us, and they do so in terms of groups which are always already associated with specific attributes, stereotypes, and norms” (Young, 1990 p.46). This seems to be the case when people commence undergraduate study. They are thrown into membership of a group identified as undergraduate students and ascribed with attributes associated with this group. These attributes include the notion that undergraduates are young, making the transition to adulthood (Kasworm, 2004), and free from commitments and obligations to be students twenty-four hours a day, seven days a week (Shale, 1999). However, adult students, because of the stage they are at in their lives, their adult status, and the commitments and responsibilities they often combine with their studies, are different (Fairchild, 2003; Home, 1997; Murphy, 1998; University of Alberta, 1983). But even though they are different they are also undergraduate students and as a consequence still subject to the same expectations associated with being undergraduate students (Kasworm, 2004).

Expectations associated with undergraduate education can be seen in eligibility criteria for scholarships that assume undergraduates are entering university directly from high school and completing full-time study. These criteria match the experience of the dominant group within the undergraduate community, traditionally aged students, but do not match the experience of adult students (Fairchild, 2003; Keast, 2000; O'Heron, 1997; Shale, 1999). Young states that "often without noticing that they do so, the dominant groups project their own experience as representative of humanity" (1990, p.59). The effect of such projection is that the dominant group experience is assumed to be the norm to the extent that any challenge is not contestable. As a consequence not only do those people who do not resemble the dominant group become stereotyped and marked out as both deviant and inferior to the norm, but also their differing circumstances go unnoticed by the dominant group who make assumptions based on what everyone 'knows' and therefore do not question. In their research, Osbourne et al (2004), Kasworm (2004), Campbell (1993), and Brookfield (2001), all found that adult students both perceived themselves to be, and were perceived to be, different within the educational institutions they studied. And Sissel et al (2001) found that not only were adult students often thought of as educational failures because they were attending college at an age not usually associated with undergraduate education, but also that administrators at the institution they studied failed to acknowledge that there was any difference in adult students as a group. These findings validate Young's theory of how difference is perceived as both deviant and inferior. Young defines this form of oppression resulting

from the generalization of the dominant groups' experiences as "cultural imperialism" (1990, p. 58). She states:

Cultural imperialism involves the universalization of a dominant group's experience and culture, and its establishment as the norm. Some groups have access to...the means of interpretation and communication in a society. As a consequence, the dominant cultural products of a society, that is, those most widely disseminated, express the experiences, values, goals, and achievements of these groups... Since only the dominant group's cultural expressions receive wide dissemination, their cultural expressions become the normal, or universal, and thereby unremarkable. Given the normality of its own cultural expressions and identity, the dominant group constructs the differences which some groups exhibit as lack and negation. These groups become marked as 'Other'" (Young, 1990, p.59).

Cultural imperialism, as described by Young, seems to offer an explanation of how adult students are overlooked within undergraduate communities. But in this case the overlooking of adult students does not exactly follow Young's model of cultural imperialism, because even though traditionally aged undergraduates form the dominant group within university settings, they are not in a position to project their norms onto the whole undergraduate community because they do not hold any power. However, since within university communities traditionally aged undergraduate students are taken to be the reference point from which university administrators develop policies, their experiences are assumed to be the norm to which other groups conform as undergraduate students and the differences of non-traditional students are thereby overlooked. As a result traditional undergraduates benefit from university policies developed with them in mind while many non-traditional students, because of difference, may not benefit from the same opportunities.

In her writing on the myth of merit (1990, pp.192-225) Young ties relational difference within groups and cultural imperialism to the other theoretical concepts framing understanding of this thesis: formal equality and substantive equality. Young uses an example in her discussion of the myth of merit that illustrates how formal equality provisions often fail to recognize that the same opportunity is not provided to all members of social groups because the relational differences between group members have been overlooked. The example Young discusses is the assumption that education provides equal opportunities to all people. Young notes that: “educators mistakenly believe they have produced equal educational opportunities when no one is barred from following a course of study because of race or gender and when in principle all students follow the same curriculum and are measured according to the same standards” (1990, p.206). However, equal opportunities do not exist in education because of class, race, gender, and ableness differences between individual students and between communities of students that adversely impact the abilities of those who are different to access equal opportunities. This example helps to illustrate the concept of formal equality: a model of equality that starts from the basis of sameness of a dominant group and assumes that all group members are the same and therefore have the same access to opportunities and the same abilities to perform according to rules and standards that match those displayed by the dominant group (IWARA, 2001).

In considering formal equality (MacKinnon (2005) traces its roots to Aristotle’s writing in *Ethica Nichomachea* where the concept of “treating likes alike and unlikes

unalike” (2005, p.45) was first codified in the legal system. MacKinnon notes that over history formal equality has justified slavery, segregation, and women’s lack of citizenship, because the dominant group decides who is and who is not like them and then treats those who are in one manner and those who are not in a manner they consider befitting the different group. MacKinnon states that because formal equality assumes equal treatment it has not been scrutinized in relation to such issues as: “sameness (the same as whom?), the social creation and definition of difference (how is difference created and perceived?), and the comparative empirical approach itself (why not measure treatment and status against a principal or a standard or an outcome rather than measuring people’s attributes against each other?)” (2005, pp. 47-48). The concept of substantive equality attempts to address such issues.

A substantive equality approach differs from formal equality in that it recognizes that difference, disadvantage and oppression exist and requires that law and policy makers to take account of their effects (Court Challenges Program of Canada, 2005). Substantive equality views the impact of formal rules from the point of view of their social contexts to ensure that laws and policies promote full participation by everyone in society, regardless of their personal characteristics or their group membership. Substantive equality challenges common stereotypes about group characteristics that might underlie law or policies to ensure that important differences in life experience are taken into account (Court Challenges Program of Canada, 2005).

Substantive equality, which has as its starting point “an appreciation of the differences between us, recognize[s]...that for laws and social policies to have real equality as their outcome, they must take into consideration the real differences between and among the social groups as well as the contexts in which difference arise” (Denike and Renshaw, 2003, 1.1). An example cited in case law that offers an explanation of the concept of substantive equality is *Eldridge v. British Columbia* (1995) in which the Supreme Court found that treating deaf patients as the same as other patients was discriminatory because although they had access to the same medical and hospital services if sign interpreters were not present they could not access equal health benefits (quoted in Denike and Renshaw, 2003).

The provision of formal equality measures might be seen in university-administered undergraduate scholarships in that seemingly they are based only on academic merit. And the failure of universities to provide substantive equality to all undergraduate students might be seen in the eligibility criteria for these awards that fail to accommodate for differences that exclude some groups from scholarship provisions even if they achieve the required academic standard. The premise on which this thesis is based is that adult students do not have the same opportunities to win undergraduate scholarships because their difference renders them ineligible from many scholarship opportunities. The research conducted in this thesis aims to discover whether or not this premise is sound through examination of quantitative data gathered from one Canadian university own records.

Chapter 3

The Study

Methodology:

This research study questions whether adult students have the same opportunities to access services in their university education as traditionally aged undergraduates through the examination of one service available to undergraduate students: university-administered undergraduate merit-based scholarships. This study investigates both the content and the outcome of eligibility criteria used in undergraduate scholarship allocation policies to discover if adult students have the same opportunities to access these awards as traditionally aged undergraduates. Findings are framed by Young's (1990) concepts of relational difference and cultural imperialism, and by notions of formal equality and substantive equality (IWARA, 2001; Denike and Renshaw, 2003).

The methodology used in this study is a single setting case study combined with a survey of ten other settings. I chose to use a single setting case study because it is well suited to an exploratory investigation of empirical evidence from a single setting (Yin, 1994). This methodology best captures the in-depth complexities of the one setting (Stake, 1995); produces findings that might prompt larger scale studies if aspects of the investigation can be applied to other settings (MacNeil, 1985) and makes use of data collected from multiple sources (Tellis, 1997) to take findings into a wider context (Yin, 1994).

This study includes the following five components of a case study as outlined by Yin (1994, pp.20-27). It seeks to address the questions: how are scholarships allocated at this university, and what are the outcomes of these allocation processes? It is based on the proposition that adult students do not have the same opportunities to access undergraduate scholarships as traditionally aged undergraduates. It draws data from the university's own records that show the outcome of scholarship allocation policies. And it links data to the proposition through statistical testing of data to discover if adult students do or do not have the same opportunities as traditionally aged students to access undergraduate scholarships. Finally, the criteria that are used to interpret findings are the results of the statistical testing of data that determine if there is a significant difference in the number of scholarship awards made to adult students as compared to the number made to traditionally aged students in proportions to the presence of each group within the undergraduate population.

Research Design:

The design of this study results from difficulties encountered with data collection. Originally, I intended to compare policy eligibility criteria with quantitative data about the age and gender of successful recipients of undergraduate scholarships at three universities of different sizes (either within the same province or from different parts of Canada) and by analyzing this information discover if adult students were recipients of scholarship awards in proportions that reflected their presence in the undergraduate community at each of the universities, and also to discover if gender had any affect on

results. However, the first problem I encountered with this research design occurred when I started to talk to university Directors of Financial Aid about my research ideas. It was explained to me that whilst many Directors were very interested in my topic there would be difficulties associated with data collection because of administrative limitations resulting from the computer information system most commonly used by Canadian universities.

The administrative information system most often used by Canadian universities was developed with US universities in mind. The financial aid component of this system does not fit Canadian institutions and is presently being developed. As a result most Canadian universities use their own financial aid report-making programs and since none of the financial aid offices at the universities I approached routinely prepared reports showing ages of recipients of undergraduate scholarships, special provisions would have been needed to produce the types of reports I required. Several Directors of Financial Aid informed me that when the financial aid component is available (perhaps in two or three years) then producing reports that show ages of recipients of scholarships would take hours rather than the weeks it might take at present. Senior administrators at one of the universities I contacted very generously volunteered to develop the software that would allow the reports I required to be generated. Data showed the headcount totals of women aged less than 25 years, men aged less than 25 years, women aged 25 years and older and mean aged 25 years and older who were recipients of each of the three classes of scholarships available at the case study university (entrance, in-course and part-time students' scholarships) for five years. This was the information I had requested.

However, when it came time to test data I discovered that although the university that had helped me gather data did produce reports that showed the age of full and part-time students and of students entering the university by head count totals, it did not break this information down to show gender. And I discovered that unfortunately the university would not be able to create these reports for me because it had just started to switch all its operating computer systems over to the information systems used at the majority of other Canadian universities and so pressure of work meant that special requests for reports could not be accommodated.

Since I was only able to access data that would compare adult students' success with traditionally aged students, but not data that would further break down to show gender differences across the two age groups I could not complete a gender analysis for my study. I therefore changed the design of the study to a case study of the single institution where data could be collected and limited my study to an examination of age differences in the allocation of scholarships awards only. Then, in order to get a sense of whether or not findings from the case study were likely to be typical of other Canadian universities, I surveyed other universities to discover if scholarship eligibility policies similar to those discovered at the case study university were in place at these institutions, and assumed that if they were then similar results might also be expected at these settings.

Data Collection Methods:

There were three data collection methods used in the study. In the first, publicly available information about the case study university was collected. This information included data about the size of the university's undergraduate student population, the age and numbers of students who enter undergraduate education at the university each year, age demographic changes in the undergraduate population over a five year period, the proportion of undergraduates who study full-time and those who study part-time, the break down of age of undergraduates, and a comparison of age to study habit (full-time or part-time).¹⁰ Data collected showed head count totals. I also examined undergraduate scholarship provision information available to students on-line or in the university's calendar to determine the types of scholarships that are available at the university and the general eligibility criteria (rather than any specific eligibility criteria attached to individual awards) that underlie the allocation of undergraduate scholarships. Senior university financial aid personnel helped clarify my understanding of this publicly available information in interviews. This first stage of data collection provided a background for the quantitative data that was later collected.

The second data collection method I used involved the collection of data from the case study university's own records. Computer reports were generated for me by the university's own personnel with the approval of a senior administrator. A member of the computing staff developed programs that would report the numbers of female undergraduates aged less than 25 years, the number of male undergraduates aged less

¹⁰ Data sets were collected for the academic years from 1999/2000 to 2003/2004.

than 25 years, the number of female undergraduates aged 25 years and older and the numbers of male undergraduates aged 25 years and older who had been recipients of each of the classes of scholarship identified through the first data collection method (entrance, and in-course scholarships) for the last five years that records were available. These records were collected for five years so that any changes that had occurred over that time could be noted. It was not possible to analyze the gender component of the recipient data gathered because comparative data showing the entire undergraduate population by age, gender and study habits were not available. However it was possible to make some tentative speculations about the affect of both age and gender on undergraduate scholarship allocation at the university based on comparative undergraduate population data that was available for years preceding the years in which recipient data were collected.

The university also awards scholarships to part-time students; however for the five years that data were collected information about the age of recipients of part-time students' scholarships was included in the in-course scholarship totals. This occurred because university financial aid reports do not separate information about part-time scholarship recipients from full-time in-course scholarships recipients. Separating these two data sets was a time consuming exercise for university staff in that it involved manually drawing the student numbers of recipients of part-time students' scholarships from a master list of all scholarship and bursary recipients and then matching these numbers to other records to discover the age and gender of these students. As a result, it

was completed for only one year, a year that was not included in the other data sets.¹¹ Information about recipients of part-time students' scholarships for this year was analyzed separately. A final data set collected by university personnel showed the age and gender of undergraduate students with grade point averages over 6.5. The Director of Financial Aid at the case study university chose this grade point average (GPA) because it represents the GPA above which undergraduate scholarships are most often awarded. This data set was collected for only one year.¹²

These data sets were gathered for the following reasons: to discover the number of adult students who are awarded undergraduate scholarships and compare these numbers to the total number of younger students who are awarded scholarships to see if any changes in these numbers have occurs over time; to discover if there is any gender differences across the two age groups in the allocation of undergraduate scholarships;¹³ to discover if adult students are more successful in accessing entrance scholarships or in-course scholarships; and to discover if adult students display the academic ability to win merit based scholarships.

The third data collection method used in the study was a survey. The survey was conducted by e-mail. Problems finding e-mail addresses for Directors of Financial Aid at Canadian universities limited the number of surveys that were sent out. The first surveys

¹¹ Data sets were collected for the academic year 2004/2005.

¹² 2004/2005.

¹³ As previously stated, during analysis of data it became apparent that it would not be possible to examine gender differences in this study because of missing data. A gender analysis would make interesting further study.

were sent to the 15 Directors of Financial Aid whose contact information appeared on the webpage of the Canadian Association of Student Financial Aid Administrators (CASFAA, 2005). Then, in order to draw responses from as large a number of Canadian institutions as possible I searched the website of individual universities to find contact information for Directors of Financial Aid. I used the list of universities that appears in Maclean's Magazine Guide to Canadian Universities 2005 (Maclean's, 2005). I reviewed the web pages of each university listed in the Maclean's rankings to try to discover e-mail contact information for Directors of Financial Aid or for Financial Aid offices. In keeping with the ethical consent for this study I did not want to put pressure on potential participants to participate since in ethical research such agreement must be freely given, and so I recruited survey participants only from publicly available sources. I sent surveys to about 30 universities that made contact information for Directors of Financial Aid publicly available on their websites.

The survey (see Appendix A) asked about general eligibility criteria for entrance scholarships, in-course scholarships and part-time students' scholarships. It also asked how these criteria were developed and if changes had occurred; whether or not adult student had equal access to undergraduate scholarships; and whether or not the university keeps reports on the age of recipients of undergraduate scholarships. As an afterthought, the survey asked respondents to contact me if they were interested in contributing quantitative data to the study. Surveys were worded so that short responses could be provided. This was done to encourage participation. Even so, administrators from two universities replied stating that the survey would take far too much time for them to

complete, and so did not participate. The timing of the survey might have had some effect on the response rate as it was sent out at the start of the summer session and this is a busy time for university Financial Aid departments. The total number of universities that provided findings for this study was ten, representing 15% of Canadian universities (there are 67 universities in Canada). None of the respondents volunteered to contribute quantitative data.

To ensure that quantitative data gathered at the case study university were genuine, all data were compiled by the university itself: data relating to student population were drawn from publicly available sources compiled by the university's institutional analysis department, data relating to scholarships were drawn from publicly available sources clarified through interviews with senior Financial Aid staff, and finally data relating to scholarship recipients and data relating to grade point averages were gathered by senior systems personnel at the university. To ensure the accuracy of statistical testing all mathematical and statistical calculations were completed using computer software, and a university professor skilled in statistical analysis assisted with input of data and interpretation of statistical findings. These measures were taken to ensure that findings were accurate.

Analytical Methods:

Analytical methods used varied with the method used to collect data. Data collected from websites that provide background information about the undergraduate

student population at the case study university and the policies used in the allocation of undergraduate scholarship awards are not analyzed but simply presented as reports of findings to highlight elements that are significant in terms of the study. Data generated for this study by the case study university were analyzed using chi-square statistical tests to determine if the adult students who were successful recipients of undergraduates came from the same population as the traditionally aged undergraduates who were successful scholarship recipients in each class of scholarship and in each year. And data that were generated from survey findings from the ten other universities were collated in numerical formats to indicate the extent to which similarity was found among survey responses.

Chi-square testing of data was completed because if findings from the quantitative research showing the age of scholarship recipients were presented as raw data, findings would not provide a true indication of whether or not these results were significant because adult students are not present in the undergraduate student population at the case study university in the same proportion as traditionally aged undergraduates. As a result any disparity between the numbers of undergraduate students aged less than 25 years and those aged 25 years and older who were awarded a class of undergraduate scholarship in any year might be accounted for by the fact that there were fewer adult students in the undergraduate population. Instead data were tested to determine if the success rate of the two sample groups (students aged less than 25 years and students aged 25 years and older) in each of the different classes of awards in each of the years studied indicated if two sample groups were drawn from the same population and therefore had the same chance of success accessing scholarships.

I have a very limited knowledge of statistics and so I relied totally on the help given to me by a university professor with expertise in statistical research in choosing, designing, and interpreting all data analysis used in this study. The statistical test that was applied to raw data was the chi-square test. The rationale for choosing this statistical test is that it is a test that is well suited to comparison of data from two sample groups to determine if they come from the same population and since I was drawing on data comparing two age group samples that make up of undergraduate students at the case study university, a comparison of success data would indicate if the two samples had equal access to undergraduate scholarships if statistical testing showed they came from the same population.

The chi-square test is a statistical test of significance. Using this test the frequency with which members of each of the age group were successful as recipients of awards were tested to discover whether these frequencies were similar such that they would occur if all things that might influence chances of success were equal (McCollough and Van Atta, 1963). Findings provide evidence of any significant difference between the two groups as recipients of scholarship awards. Chi-square tests produced results that show how much better or worse one age group did than the other and whether or not this is the sort of difference that would normally be expected if the chances of success for each group were the same (McCollough and Van Atta, 1963). Data were tested against the following null hypothesis: that success in obtaining a scholarship award is the same for the two age groups: aged less than 25 years and aged

25 years and older. Data were tested to determine if the results were significant. If so, the null hypothesis could be rejected, and a conclusion could be reached that there was a significant difference between the success of traditionally aged undergraduates in accessing scholarship awards and the success of adult students in accessing scholarship awards.

However, while results from the statistical analysis of data might indicate if one of the age groups was significantly more likely to be successful in accessing undergraduate scholarships than the other, there is a variable that might explain the results achieved through statistical testing. This variable is that all scholarship awards are based on academic achievement. As a result the success of the two age groups in accessing awards might be influenced by this variable: if the two age groups do not share similar levels of academic achievement then one age group might be less likely to be successful recipients of scholarships. In order to discount the influence of this competing variable, grade point average (GPA) results were considered in relation to success in scholarship award results. Data showing the GPAs of the two age groups were compared to determine if there was any significant difference between the GPAs of undergraduate students aged 25 years and older and those aged less than 25 years.

Ethical approval:

Three of the guiding principles contained in the Tri-Council policy statement on ethical conduct for research involving human subjects are: respect for fully informed

consent; respect for privacy and confidentiality; and the minimization of harm to participants (Medical Research Council of Canada, Natural Science and Engineering Research Council of Canada, and Social Science and Humanities Research Council of Canada, 2003). In making my application for ethical approval for the research undertaken in this thesis I designed my study to allow for free and fully informed consent by using publicly available information to find contact information for potential participants and sending information letters to potential participants clearly explaining what I hoped to accomplish in my research and what I would be asking of participants. To protect the anonymity of those members of staff at the participating universities that provided data used in this study (either interview data, quantitative data, or survey data) and also to minimize any harm that might result in risks to their employment attributable to participation in the study, participants are not named nor identified in any way in my study and the universities where they are employed are not identified by name. Ethical consent was obtained for both the research conducted at the case study university (Appendix B) and for the surveys (Appendix C). In keeping with these approvals, and in order to preserve the anonymity of the university personnel who contributed data, in the reporting of findings, the university will be referred to only as 'the case study university', data reported from its websites will not be referenced, and the universities that responded to the survey will not be named.

Chapter 4

Findings

The Case Study University:

The university that is the subject of this case study is a mid-sized university classified as “comprehensive” in Maclean’s magazine survey of Canadian universities because it offers a wide range of programs at both undergraduate and graduate level including professional degrees and also carries out a significant amount of research (Maclean’s, 2005). The case study university is in a active period of growth framed by a strategic plan that presents its vision for the future in four strategic areas: people, quality, community, and resources. Goals are set in each area together with measurable objectives that work towards goal achievement. The case study university recognises the importance of people by setting as its primary goal the recruitment and retention of a diverse community where equity and quality are supported. The first objective listed in the plan is aimed at ensuring that fairness and equity are incorporated into *all* procedures and activities at the case study university. And the second objective listed in the plan is aimed at ensuring that there are no hurdles to outstanding students.

The Undergraduate Community:

The case study university has an undergraduate student population of about 16,000 made up of approximately 10,500 full-time students and 5,500 part-time students.

Currently,¹⁴ there are about 11,600 traditionally aged undergraduates, comprising 73% of the undergraduate student body, and about 4,400 adult students comprising 27% of the undergraduate community. Over the five years studied, the university's total undergraduate population increased by about 1000 students but the proportion of traditionally aged students to adult students has remained fairly constant (see table 1).

**Table 1:
Undergraduate Population**

	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05
Total undergrads	14984	15504	16052	15731	16056	15920
Total aged under 25 yrs	11287	11124	11505	11759	11500	11614
Proportion under 25 yrs	75.33%	71.75%	71.67%	74.75%	71.63%	72.95%
Total aged 25 and over	3697	4380	4547	3972	4556	4306
Proportion 25 and over	24.67%	28.25%	28.33%	25.23%	28.37%	27.05%

Information compiled using the case study university's undergraduate headcount and undergraduate study habit data.

Currently 65% of all undergraduates study on a full-time basis and 35% of all undergraduates study on a part-time basis (see table 2). Within the sub-group made up of traditionally aged undergraduate students, 75% study full-time and 25% study part-time: and within the sub-group made up of adult undergraduate students, 40% study full-time and 60% study part-time (see table 2). The undergraduate student population as a whole currently¹⁵ comprises 55% traditionally aged students who study full-time, 18% traditionally aged students who study part time, 10% adult students who study full-time and 16% adult students who study part-time (see table 2). These proportions have remained fairly constant over the five years of the study.

¹⁴ Currently refers to the academic year 2004/2005. The five academic years that comprised the study period were 1999/2000 to 2003/2004.

¹⁵ Currently refers to the academic year 2004/2005

**Table 2:
Study Preferences**

	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05
Total undergrads	14984	15504	16052	15731	16056	15920
Total full-time	9524	9618	9898	10006	10279	10431
Proportion full-time	63.56%	62.03%	61.66%	63.61%	64.20%	65.52%
Total part-time	5460	5889	6154	5725	5777	5489
Proportion part-time	36.44%	37.98%	38.34%	36.39%	35.98%	34.48%
Total full-time under 25	8250	8053	8159	8544	8482	8715
Prop under 25 F/T¹	73.1%	72.29%	70.92%	72.66%	73.76%	75.04%
Total part-time under 25	3037	3089	3346	3215	3018	2899
Prop under 25 P/T²	26.9%	27.71%	29.08%	27.34%	26.24%	24.96%
Total full-time adults	1274	1583	1738	1462	1797	1716
Prop adults F/T³	34.46%	36.14%	38.22%	38.81%	39.44%	39.85%
Total part-time adults	2423	2797	2809	2510	2759	2590
Prop adults P/T⁴	65.54%	63.86%	61.78%	61.19%	60.56%	60.15%
Prop all F/T under 25⁵	55.01%	51.94%	50.83%	54.31%	52.83%	54.74%
Prop all P/T under 25⁶	20.27%	19.92%	20.84%	20.44%	18.80%	18.21%
Prop all F/T adults⁷	8.5%	10.21%	10.83%	9.29%	11.19%	10.78%
Prop all P/T adults⁸	16.17%	18.04%	17.49%	15.95%	17.18%	16.27%

Information compiled using the university's undergraduate headcount and undergraduate study habit data.

¹ Proportion of total undergraduates aged less than 25 years who study on a full-time basis.

² Proportion of total undergraduates less than 25 years who study on a part-time basis.

³ Proportion of total adult students who study on a full-time basis.

⁴ Proportion of total adult students who study on a part-time basis.

⁵ Proportion of total undergraduate population of all aged less than 25 years who study on a full-time basis

⁶ Proportion of total undergraduate population of all aged less than 25 years who study on a part-time basis.

⁷ Proportion of total undergraduate population of all aged 25 years and over who study on a full-time basis.

⁸ Proportion of total undergraduate population of all aged 25 years and over who study on a part-time basis.

The case study university uses three different definitions of "full-time" study in its different administrative departments: full-time is defined as completing 100% course load (that is ten courses in an academic year) in the allocation of undergraduate scholarships and by its institutional analysis department; 80% course load (eight courses in an academic year) by its registration department; and 60% course load (six courses in an

academic year) for student loans and in the allocation of undergraduate bursaries. The university defines an academic year as between September and April. Since numerical data about the undergraduate population have been taken from the university's institutional analysis web pages where "full-time" status is based on 100% course load and since this study is concerned with the allocation of undergraduate scholarships where "full-time" is also defined in this way, then 100% course load will be taken to be the definition of "full-time" studies in reporting findings in this thesis and "part-time" will refer to taking any number of courses that is less than 100% course load.

Table 2 shows the study habits of the university's undergraduate population for the five years of the study. The proportion of all undergraduates who studied full-time was fairly consistent throughout this time and represented about two-thirds of the undergraduate population the other one-third of all undergraduates studied on a part-time basis. Age can be seen as a determinant of study habit. The majority of traditionally aged students study on a full-time basis (about 75% of all undergraduates aged less than 25 years), while the majority of adult students study part-time (about 63% of all undergraduates aged 25 years and older).

The case study university currently does not prepare reports that show full-time and part-time undergraduate headcounts by age and by gender. However, the university did prepare such reports in the years from 1993/94 to 1997/98. Examination of this data for one year, 1997/98, shows that the proportion of all undergraduates attending the

university as full-time students was about 61.7%¹⁶ and the proportion of part-time undergraduates attending the university that year was about 38.3%.¹⁷ These proportions are fairly similar to the proportions of full-time to part-time students during the study period years (see table 2). As a result some similarities in age and gender breakdown might be assumed in the study period, even though the absence of this data for the years of the study means that gender analysis of the case study university's undergraduate population by age will not be possible.

**Table 3:
Undergraduate Students by Age and Gender 1997/98**

	Total	Under 25 male	Under 25 female	25+ male	25+ female
Total Students	15327				
Total full-time	9458	3329	4441	842	846
Prop. full-time		35.2%	46.95%	8.91%	8.94%
Total part-time	5869	1400	1750	763	1956
Prop. part-time		23.85%	29.82%	13%	33.33%
Trad-aged f/t	7770	3329	4441		
Proportion f/t¹		42.84%	57.16%		
Adult f/t	1688			842	846
% adult f/t²				49.88%	50.12%
Trad-aged p/t	3150	1400	1750		
Proportion p/t³		44.44%	55.56%		
Adults p/t	2719			763	1956
Proportion p/t⁴				28.06%	71.94%

Information compiled using headcount by age and part-time studies data.

¹ Proportion of all undergraduates aged less than 25 years who study on a full-time basis.

² Proportion of all undergraduates aged 25 years and older who study on a full-time basis.

³ Proportion of all undergraduates aged less than 25 years who study on a part-time basis.

⁴ Proportion of all undergraduates aged 25 years and older who study on a part-time basis.

¹⁶ Calculated from table 3: Total full time undergraduate students (9458) divided by total undergraduates (15327) multiplied by 100 = 61.7%

¹⁷ Calculated from table 3: Total part-time undergraduate students (5869) divided by total undergraduates (15327) multiplied by 100 = 38.3%.

Table 3 shows that in the academic year 1997/98 the greatest proportion of full-time undergraduates was in the under 25 year age group: approximately 82%¹⁸ of undergraduates fell into this age group of which 35% were male and 47% were female. Adult students accounted for only about 18%¹⁹ of the full-time undergraduates that year split almost evenly between male and female adult students. The total number of traditionally aged students who studied on a part-time basis was fairly close to the total number of adult students who studied part-time: 3150 traditionally aged students and 2719 adult. The largest proportion of part-time students by gender comprised female adult students, 33%, with male adult students forming the smallest proportion of all part-time students (13%). Women (63%)²⁰ were more likely to study on a part-time basis, and female adult students are the group of part-time undergraduates most likely to study part-time: 72% of all adult undergraduates who study part-time are women. Men are significantly less likely to study on a part-time basis (36.85%)²¹, which suggests that men, as a group, might be favoured by eligibility criteria for undergraduate scholarships that require recipients to be full-time students. Findings that indicate that women are more likely to return to education as adults and that adult women are the group of undergraduates who are most likely to study on a part-time basis are in keeping with literature findings that show that the majority of adult students study part-time and that

¹⁸ Calculated from table 3: Proportion of all male undergraduates aged less than 25 years who study on a full-time basis (35.2%) + proportion of all female undergraduates aged less than 25 years who study on a full-time basis (46.95%) = 82.15%.

¹⁹ Calculated from table 3: Proportion of all male undergraduates aged 25 years and older who study on a full-time basis (8.91%) + proportion of all female undergraduates aged 25 years and older who study on a full-time basis (8.94%) = 17.85%

²⁰ Calculated as proportion of women aged less than 25 years who study part-time (29.83%) + proportion of women aged 25 years and older who study part-time (33.33%) = 63.16%

²¹ Calculated as proportion of men aged less than 25 years who study part-time (23.85%) + proportion of men aged 25 years and older who study part-time (13%) = 36.85%.

overall adult women are more likely to be part-time students than any other group of students (Fairchild, 2003; Keast, 2000; Kasworm, 2004; O'Heron, 1997).

The proportion of students entering the case study university directly from public high schools in British Columbia (table 4) varied slightly over the years that were studied: the proportion of students entering directly from BC public high schools ranged from 32% to 37% but generally did not represent more than about a third of the total number of entering undergraduate students each year. Distinguishing between those undergraduates entering directly from a BC public high school and those not entering directly from high school is an important consideration in relation to entrance scholarships eligibility criteria at the case study university, because the majority of entrance awards are specifically designated to students entering directly from high school (see page 68).

**Table 4:
Undergraduates Entering the University**

	1999/00	2000/01	2001/02	2002/03	2003/04
Total undergrads entering	3131	4086	3895	3237	3788
# Entering direct from BC public high schools	1111	1349	1442	1089	1238
% Entering direct from BC h/s	35.48%	33.02%	37.02%	33.64%	32.68%
% All students not entering direct from BC public high schools	65.42%	66.98%	62.98%	66.36%	67.32%
Total adults entering	545	670	736	670	686
% Adults entering	17.4%	16.4%	18.9%	20.7%	18.1%
% Under 25 not entering direct from h/s	47.12%	50.58%	44.08%	45.66%	49.22%

Information compiled using the university's enrolment data and head count profile.

The case study university's data showing entering students does record the last educational institute attended by entrants. However, these records do not specify whether the last recorded educational institution is the institution from which students are entering directly, and as a result it is not possible to quantify the numbers of students entering the university directly from full-time community college study (a potential group of recipients for entrance scholarship awards – see page 68). These data sets would have been useful for determining the total proportions of students who might be eligible for entrance scholarships and also for identifying the numbers of adult students eligible for all entrance awards (because of their age, adult students would not be entering the university directly from high school²²). However, since research has shown that adult students enter university from different stages in their lives (Campbell, 1993; Kasworm 2003; Murphy, 1998) it cannot be assumed that all adult students entering the university did so directly from full-time study at a community college and as a consequence it cannot be assumed that all adults students had equal access to entrance scholarships available to community college entering students.

Data from the case study university show that the majority of new undergraduates entering the case study university each year do not come directly from a BC public high

²² Adult students might be entering the case study university directly after completing Adult High School Graduation programs run by the Ministry of Education in provincial public schools. The Adult Graduation Program in the province in which the case study is located requires adult students to complete 20 Grade 11 and 12 credits in total (as opposed to the 52 Grade 11 and 12 credits required for the regular school based graduation program). Since the number of credits required (and the hours of study that determine full-time equivalency status for Ministry funding purposes) might not be sufficient to classify adults enrolled in Adult Graduation Programs as full-time students, even if they complete all the courses required in a school year, then even if they were to enter university directly after completing their Adult High School Graduation requirements they might not be included as entering directly from provincial public high schools because they might not be considered to be entering directly from full-time high school education.

school: between 63% and 67% of all new undergraduates entered some time after completing their high school education (table 4). An interesting discovery associated with the findings set out in table 4 is that a significant number of traditionally aged students enter the university some time after completing their high school education (range from 44% to 50% over the years studied), this fact contrasts with norms often associated with undergraduate education that assume an uninterrupted transition from high school to university.

Eligibility Criteria for University-administered Undergraduate Scholarships:

Each year the case study university awards a number of merit-based undergraduate scholarships. The total number varies from year to year based on the changes in the interest paid on the university's endowment fund, new endowments, and changes in the university funding of these awards. The total value of all undergraduate scholarships awarded by the case study university is considerable. Their total value has increased each year over the years that were studied from about \$1.8 million to \$4.2²³ million (see table 5). The largest proportion of scholarship money is awarded as in-course awards. Included in the totals for in-course awards are about 115 scholarships awarded to part-time students each year with a total value of approximately \$95,000. When these amounts are considered in relation to the total value of undergraduate scholarships, then awards to part-time students can be seen to be far smaller both in terms of total numbers and in terms of total values.

²³ All data relating to scholarships is reported exactly as presented to me by senior systems personnel at the case study university.

Table 5:
Total Value of Undergraduate Scholarships

Value of Awards	1999/2000	2000/2001	2001/2002	2002/2003	2003/2004
Entrance Awards	587,825	606,718	1,002,955	1,236,559	1,398,018
In-Course Awards	1,720,149	1,914,714	2,238,426	2,535,606	2,760,837
Total Value	\$1,778,874	\$2,521,432	\$3,241,381	\$3,772,165	\$4,158,816

The university awards three classes of undergraduate merit-based scholarships: entrance scholarships, in-course scholarships, and part-time students' scholarships. The allocation of these classes of awards is governed by general eligibility policies set by the university. General eligibility policies for undergraduate scholarships state that to be eligible for any scholarship, except for part-time students' scholarship, an undergraduate student must take a full year's program that is defined as 15 units of credit work (ten courses or 100% course load) within the academic year from September to April. And, except where the terms and conditions of an undergraduate award specifically state otherwise, award winners must normally return to the university in the next winter session and enrol in a full-time program. Part-time students' scholarships represent about 4% of all scholarships awarded by the university (calculated using totals from table 6 and table 7). Findings from this study show that currently about 65% of undergraduates study on a full-time basis (see table 2) and that the majority of men study on a full-time basis (see table 3). As a result, 65% of undergraduate students might be eligible for 96% of all undergraduate scholarships offered by the case study university. Also findings showing the high proportions of adult part-time students (60% of all adult undergraduates - see table 2) and the high proportion of adult women students who study part-time (72% of all adult undergraduates who study part-time - see Table 4) would indicate that the majority

of adult students, and particularly the majority of adult women students, are rendered ineligible from 96% of all scholarships awarded by the university by their study habit.

General eligibility criteria for entrance scholarships state that they are only awarded to full-time students entering the university directly from Canadian high schools or, in some cases, to students entering the university directly from full-time study at provincial community colleges. High school students must have achieved grades of 90% or higher average on the Grade 11 & 12 courses required for admission to the faculty or program applied to which they have applied. Community college applicants must show an A average grade based on a full course load. Entrance scholarship eligibility criteria appear to have been developed with the norms often associated with undergraduate education in mind because even though the university's own records show that the number of students entering the case study university directly from BC public high schools represents only about 1/3rd of entering undergraduates (see table 5) these are almost the only students eligible for the majority of entrance awards.²⁴ Table 4 shows that each year about half as many adult students enter the university as students who enter the university directly from BC public high schools, however, even though valuable special scholarship provisions are made for students entering university directly from high school, there are no special scholarship provisions made for adults students.

²⁴ The case study university does not report numbers of students entering directly from high schools in other parts of Canada. Entering student reports show students entering directly from BC public high schools, and those whose last educational institution are BC colleges and universities, universities outside BC, and non-BC institutions. This latter category not only includes those entering directly from high schools in other provinces but also those whose last school or college was in another province. The total numbers of entering students who fall into this category are much smaller. For example, in the year 2003/2004 the total number of students entering first year undergraduate studies at the case study university from institutions in other provinces was 282 compared to 1238 entering directly from BC public high schools.

The case study university's website and calendar state that to be considered for an entrance award students must apply for admission to the university by a specific date and make an application for an entrance award. However, senior staff in the financial aid department at the university state that applications for entrance awards are not necessary as those student reporting grades within the range that are normally awarded with scholarships are picked up by the university's computer system whether or not applications are made. As a result of this practice, any discrepancies in allocation between traditionally aged and adult students could not be attributable to failure to apply. All in-course scholarships (including part-time students' scholarships) awarded by the case study university do not require recipients to make applications to be considered for these awards.

The first class of undergraduate scholarship awarded by the case study university is entrance awards. These awards take two forms: renewable entrance scholarships and non-renewable entrance scholarships. The university awards about 80 renewable entrance scholarships each year to students entering full-time undergraduate education directly from Canadian high school; about 20 of these awards are also available to students entering the university directly from full-time study at community colleges. Renewable entrance awards provide scholarships from \$3,000 to \$6,500 each year to academically outstanding students who meet the eligibility criteria noted above. These awards are renewable each year for up to four years if the student maintains a grade point average of 7.5 or better. Renewable scholarships are the most valuable scholarships awarded to undergraduate students by the case study university and the fact that the

majority of these awards are only available to students entering directly from high schools indicates a favouring of this group of students above all other entering students.

The other class of entrance awards available at the case study university are non-renewable entrance scholarships. The university's eligibility criteria used for many of these awards not only includes the general eligibility criteria listed above (entering directly from high school or, in some cases, directly from full-time study at community college and attending university as full-time students) but also there are specific eligibility criteria attached to the awards themselves by benefactors. For example, some awards require that recipients be entering from specific School Districts or specific schools, or be entering study in a specific Faculty or program, or be involved in community work, or play a specific sport, or be the sons or daughters of member of a specific profession or union²⁵. Non-renewable entrance scholarships vary in value from \$300 to \$3,500. Since some non-renewable scholarships specify that they are available to students entering full-time university study directly from full-time community college study as well as to students entering directly from high school, some of these awards might be available to adult students who have chosen this pathway to university education. However, the number of awards that might also be available to community college students is less than the number available to high school students, and when non-renewable entrance scholarships are available both to high school students and to community college students, the case study university has a policy in place that states that

²⁵ Specific eligibility criteria might limit adult students' access to non-renewable scholarships, and equally they might limit traditionally aged undergraduates access. For the purpose of this study, and in the absence of any research that would contract this assumption, it is assumed that specific eligibility criteria will equally impact adults students and traditional students.

renewable entrance scholarships will be awarded to community college students at the rate of one award to a community college student for every four awards made to high school students. Not only does this policy favour students entering the university in the manner traditionally associated with undergraduate education (straight from high school) over those whose pathway to undergraduate education is different, but also it appears to fly in the face of objectives contained in the university's strategic plan aimed at ensuring equity and diversity by not putting barriers in place to outstanding diverse students.

The second class of undergraduate scholarship awarded by the case study university is in-course awards. These are made to undergraduates who have completed one year or more of university study. Individual in-course awards range in value from about \$250 to about \$3000. Many in-course awards have specific eligibility criteria attached to them by benefactors (very similar to those attached to non-renewable entrance scholarships) that direct these awards towards certain groups of undergraduates. General eligibility criteria (that is full-time status) also apply to all in-course scholarships except part-time students' scholarships. Recipients are chosen based on their grade point averages for the academic year previous to the year in which in-course scholarships are awarded. Selection of recipients for all in-course awards is automatic and students with high GPAs are automatically awarded scholarships if they meet the general and specific eligibility criteria for these awards; no applications or referrals are required. Since full-time students aged less than 25 years comprise 55% of the undergraduate community and full-time students aged 25 years and older comprise only 11% of the university undergraduate community (see table 2), then it might be possible to assume that a greater

proportion of traditionally aged student community are likely to be recipients of these awards. However, it is also possible to assume that since eligibility criteria for the majority of in-course awards requires recipients to be full-time students then the pool of students from which recipients are selected will be depleted to a greater rate for adult students than for traditionally aged students because adult students are more likely to be part-time students. As a result adult students will not have equal access to in-course scholarships, and this again contradicts the principles of fairness and equity which are central to the case study university's strategic plan.

Part-time students within the total undergraduate population currently comprise about 20% traditionally aged students and 17% adult students (see Table 2) and since these proportions are fairly similar it might be possible to deduce that traditionally aged students and adult student might have similar chances of winning part-time students' awards. Part-time students' scholarships are the last class of undergraduate scholarship awarded by the case study university. Part-time students' scholarships have different eligibility criteria in that they require recipients to complete between nine credit units (6 courses or 60% course load) and 14.9 credit units (less than 10 courses or just less than 100% course load) in each academic year before the award is made and these units of credit may be completed in any combination of two terms in the twelve month period from May through April. Part-time students' scholarships are awarded to approximately the top 3% of part-time students in each faculty. Award winners must return to the university for further undergraduate credit work within twelve months. The number of awards made to part-time students and the total value of these awards represents about

6% of both the total number and the total value of in-course undergraduate scholarships awarded by the university. As a result 36% of students of any age who study part-time (see table 2) might be eligible for only 6% of all in-course undergraduate scholarships that are awarded by the university. In comparison, 65% of all students who currently study full-time might be eligible for 94% of all in-course awards if, as with part-time students' scholarships, they achieve the required GPAs. The extreme differences in these proportions indicate that the case study university favours rewarding norms traditionally associated with undergraduate education rather than to supporting diversity.

The university's policies on scholarships notes that these are awards made to academically excellent students. Even though this statement appears to indicate an egalitarian approach to scholarship provisions, an examination of policies developed to aid in the selection of candidates would indicate that at the case study university these allocation policies have the effect of funnelling awards towards full-time students and also towards those making the transition to university education directly from high school and away from those students displaying more diverse choices in pursuing their education. Eligibility criteria might be used to establish level playing fields from which candidates who are all the same can be selected (as they require all entering students to have completed the high school graduating exams in the same year, and they require all in-course students to have taken the same number of course so that no time advantage might result), however, such criteria also fail to recognize that notions traditionally associated with undergraduate education do not match significant proportions of the undergraduate community at the case study university: only about a 1/3rd of all of

undergraduates enter the case study university directly from high school and only about 2/3rd of all undergraduates study on a full-time basis (see tables 4 and 2). While the creation of a level playing fields might be helpful for selecting recipients from among students who are all the same, such measures fail to recognize the relational differences of those who are different, and since adult students comprise the group that is most likely to be different, they are therefore also most likely to be excluded from access to undergraduate scholarships by eligibility restrictions. Failure to recognize and accommodate for differences within the undergraduate community suggests that formal equality is assumed in the rules set to establish eligibility and that the substantive differences of some members of the undergraduate community are overlooked in the allocation process.

Findings from the Study:

University personnel generated data sets used in the study from the case study university's own records. Raw data findings are set out in tables 6, 7, 8 and 9 below. These tables show: the age and gender of recipients of entrance and of in-course undergraduate scholarship awards for five years (1999/2000 to 2003/2004); the age and gender of recipients of part-time students' scholarships for one year (2004/2005); and the age and gender of undergraduates with grade point averages (GPA's) above 6.5 (the academic level above which scholarships are most often awarded) for one year (2004/2005).

Table 6
Raw Data Findings: Entrance Scholarship Recipients

Entrance Scholarships	1999/00	2000/01	2001/02	2002/03	2003/04
Total adult recipients	6	7	16	12	27
Total recipients under 25 yrs.	264	275	394	481	536
Total adult women recipients	3	4	8	6	17
Total trad-aged women recipients	159	175	255	282	344
Total adult men recipients	5	3	8	6	10
Total trad-aged men recipients	105	100	139	199	192

Table 7
Raw Data Findings: In-Course Scholarship Recipients

In-Course Scholarships	1999/00	2000/01	2001/02	2002/03	2003/04
Total adult recipients	139	136	156	159	156
Total recipients under 25 years	641	721	767	817	767
Total adult women recipients	90	94	99	111	99
Total trad-aged women recipients	393	444	494	509	494
Total adult men recipients	49	42	57	48	57
Total trad-aged men recipients	248	277	273	308	273

Raw data sets indicated that traditionally aged students had far greater success in accessing of all classes of scholarship awards and that adult students were far less successful recipients of all classes of scholarship awards even though they displayed similar levels of academic ability to traditionally aged undergraduate students (see table 9 below). For example, in the year 2003/2004 adult students were awarded only about 5% of all entrance scholarships (calculated using data included in table 6) and about 16% of all in-course scholarships (calculated using data included in table 7). Surprising, given

the criteria used to determine eligibility for entrance scholarships, is the fact that the number of entrance awards to adult students more than doubled in the last year studied. (Interviews discovered that there were no changes to the awards themselves that would account for this increase in this one year.) And notable is the fact that although the number of in-course awards made to adult students did not show a significant difference in actual numbers over the years of the study, the total number of in-course awards increased significantly over this period. (Interviews discovered that the case study university had been actively seeking increases to scholarship provisions through a active giving campaign which has a goal of being among the top 20% of Canadian universities providing financial support to students.) In all classes of awards raw data findings show that women were recipients of scholarships in higher numbers than men. However, in the case of entrance awards made to adult students, women made up by far the majority of these recipients in only one of the years, the last year studied.

While the proportion of in-course scholarship awards made to adult students is higher than the proportion of scholarship awards made to entering adult students, data showing the distribution of in-course scholarships between the two age groups are skewed by the inclusion of part-time students' scholarship data (for explanation of why part-time students' scholarship recipient information is included in in-course scholarship data please see page 51) because adult students' success rate as part-time students' scholarship recipients is greater than their success rate as recipients of all in-course awards (see table 8 below). However, even though data are skewed, assumptions can be made that the in-course success rate of adult undergraduate students would be lower if

part-time students' scholarship data were not included in in-course scholarship recipient totals. Findings still show that adult students are disadvantaged in all in-course scholarship provisions at the case study university.

Table 8

Raw Data Findings: Part-Time Student's Scholarship Recipients

Part-Time Students' Scholarships	2004/2005
Total Scholarships	115
Total adult recipients	31
Total recipient under 25 years	84
Total adult women recipients	21
Total trad-aged women recipients	39
Total adult men recipients	10
Total trad-aged men recipients	45

Examination of raw data showing ages of recipients of part-time students' scholarships shows that in this class of award gender differences are not as pronounced as in both entrance and in-course awards: women still represent the majority of adult students who are recipients, but men represent the majority of traditionally aged undergraduates who are recipients. Data that was supplied by the university for this study provided some additional information about recipients. This showed that the student who achieved the highest grade point average of all part-time students' scholarship recipients in the year 2004/2005 was a woman aged over fifty: her grade point average was 8.77, a GPA this woman could only have achieved if she had been awarded A+

grades in almost all of the courses she had completed.²⁶ In total 13 of the adult students who were part-time students' scholarship recipients in that years had GPA's over 8 (out of 31 adult recipients) and 21 of the traditionally aged students who were awarded part-time students' scholarships that year had grade point averages over 8 (out of a total of 84 recipients). This additional data provides an indication of the high level of academic ability displayed by recipients of part-time students' scholarships, and particularly of the high level of academic achievement displayed by adult students. (Please note: the number of part-time students' scholarships recipients reported may not be accurate. This data was drawn off university records manually and since the total number of awards, 115, is higher than the approximately 80 awards anticipated²⁷, and since some students had grade point averages below 6.5 (5 adult student and 3 traditionally aged students) it might be that some recipients of part-time students' bursary recipients may have been included in these data by mistake.

Differences between the numbers of traditionally aged undergraduates and adult students who are awarded undergraduate scholarships might be attributable to differences in the academic ability of these two groups. Data were therefore collected to compare academic ability of the two age groups. A grade point average of 6.5 was selected by the Director of Financial Aid as the cut off point at which those who would be likely to be recipients of undergraduate scholarships could be separated from those who would likely

²⁶ The maximum GPA it is possible to achieve at the case study university is 9 – this would be achieved if A+ grades were given for all courses taken.

²⁷ Senior personnel in Financial Aid had indicated that this was the number of part-time students scholarships awarded.

not be recipients. Data supplied showed the proportion of adult undergraduate students with GPA's over 6.5 and the proportion of traditionally aged undergraduate students with GPA's over 6.5 were fairly similar (the adult student proportion was about 5% higher), and that the average GPA's for adult students and for traditionally aged students with GPA's over 6.5 and equal to or less than 6.5 were also fairly similar. Differences in total numbers of adult students and traditionally aged students who are recipients of undergraduate scholarships at the case study university could not therefore be accounted for by differences in academic ability.

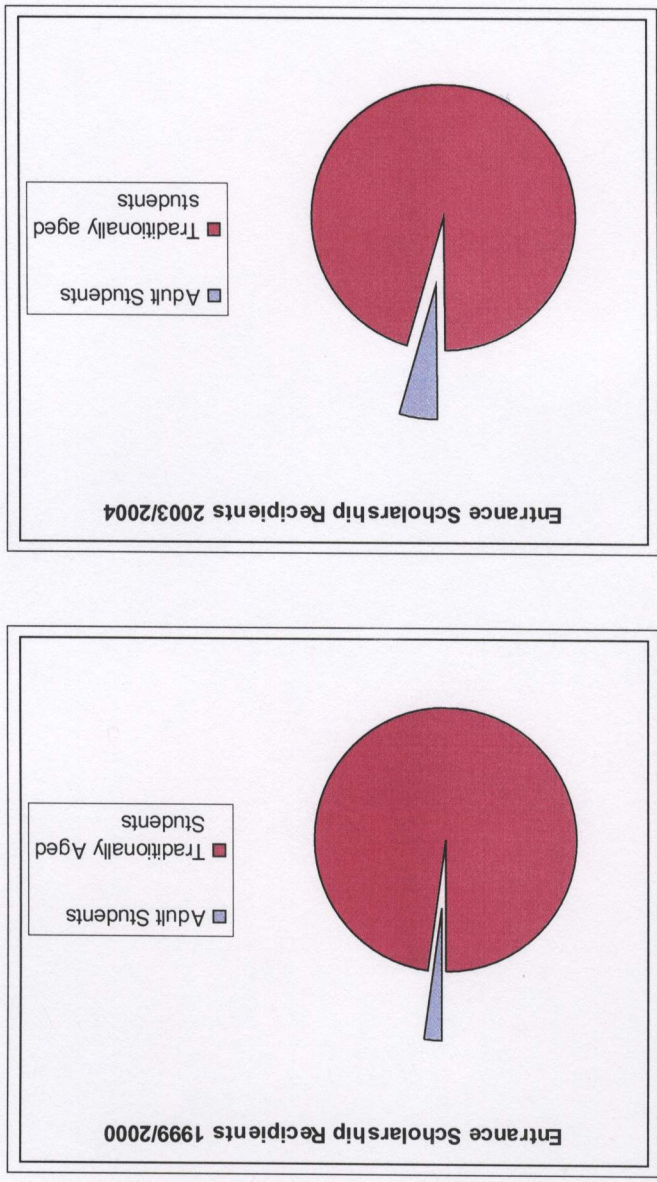
Table 9
Findings: Grade Point Averages 2004/2005

Undergraduate Grade Point Averages: 2004/2005	GPA's
% all adult undergraduate with GPA's greater than 6.5	38.21%
% all traditionally aged undergrads with GPA's greater than 6.5	33.52%
% all adult undergraduate with GPA's \leq 6.5	61.88%
% all traditionally aged undergrads with GPA's \leq 6.5	66.48%
Average GPA all female adult undergraduates	5.2
Average GPA all female traditionally aged undergraduates	5.3
Average GPA all male adult undergraduates	5.17
Average GPA all male traditionally aged undergraduates	5.07
Average GPA for all female adult undergrads with GPA over 6.5	7.55
Average GPA for all female trad-aged undergrads with GPA over 6.5	7.47
Average GPA for all male adult undergrads with GPA over 6.5	7.57
Average GPA for all male trad-aged undergrads with GPA over 6.5	7.50
Average GPA female adult undergrads with GPA's \leq 6.5	3.64
Average GPA female trad aged undergrads with GPA's \leq 6.5	4.11
Average GPA male adult undergrads with GPA's \leq 6.5	3.85
Average GPA male trad aged undergrads with GPA's \leq 6.5	4.0

Data prepared for the study in this format.

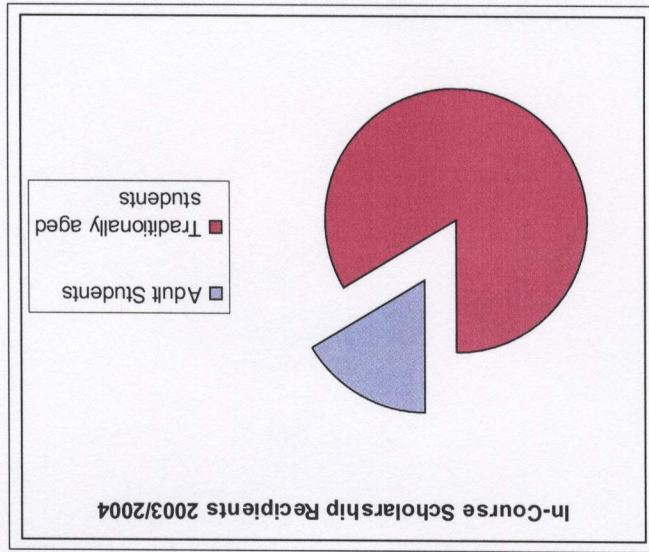
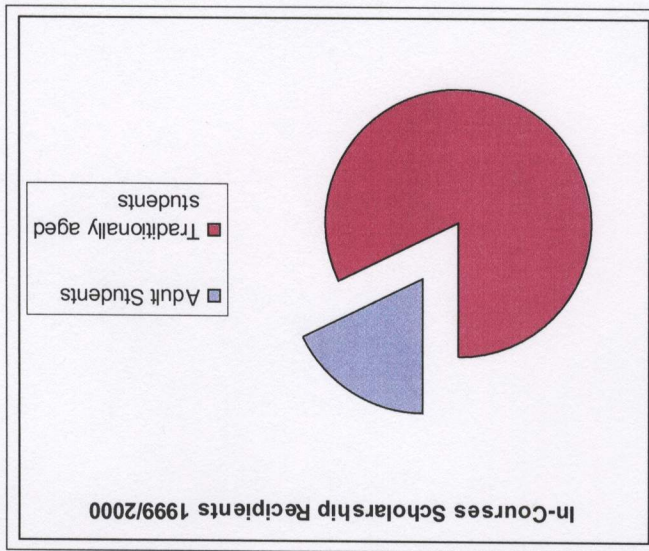
Pie chart representations of raw data from the first year in which data was gathered, 1999/2000, and the last year, 2003/2004, illustrate how despite increases in the number of scholarships available, adult students are still far less likely than traditionally

Figure 1 Comparison of Raw Data Recipients of Entrance Awards: 1999/2000 and 2003/2004



aged students to be recipients of both entrance scholarships (figure 1) and in-course aged students (figure 2). Figures 1 and 2 provide visual representations of raw data results only and do not reflect the proportions of adult and traditionally aged students who make up the total undergraduate population.

Figure 2
Comparison of Raw Data Recipients of In-Course Scholarships: 1999/2000 and 2003/2004



Since adults students make up about a quarter of the case study university's total undergraduate population some disparity in allocation of scholarship awards is to be expected. To determine if the disparity that is identified in raw data findings is accounted for by disparities in the sizes of the two age groups on which the data are based, statistical testing was carried out to see if the results obtained are the results likely to be expected if all undergraduates had equal access to scholarship provisions. Data were tested using chi-square tests to discover whether observed frequencies (raw data findings) of success as a scholarship recipient provide evidence of a significant difference between the two sample groups (that is undergraduates aged less than 25 years and undergraduates aged 25 years and older) which make up the total undergraduate population at the case study university (Connor Linton, 2003; McCollough and Van Atta, 1963). The null hypothesis on which data were tested was based on the notion that if all undergraduates have equal opportunities to access scholarship then statistical testing would show that recipients were drawn from the same population (that is the case study university's entire undergraduate population). As a result the chance of being awarded a scholarship would be the same for members of the two samples if all things were equal in the allocation of these awards. The null hypothesis was therefore that the chance of success in obtaining a scholarship award is the same for the two age groups: aged less than 25 years and aged 25 years and older.

Using a computer assisted chi-square calculator (Georgetown University, 2003) chi-squares were calculated for each class of award and for each year. The calculations were performed by the program based on the numbers that were entered into the tables. For each chi-square test, values were placed in the top two vertical table cells to show the number of adult students who received a class of award in one of the study years and to show the number of adult students who did not receive that class of award in that year. Values were placed in the bottom two vertical table cells to show the number of traditionally aged students who received the same class of award in the same year and to show the number of traditionally aged students who did not receive the award that year. For entrance scholarships, the number of students in each of the two age groups who did not receive an award each year was calculated by subtracting the number of students in each age group who did receive an award that year from the total numbers of students in each age group entering the university that year. For in-course scholarships, the number of students in each of the age groups who did not receive an award each year was calculated by subtracting the total numbers of students in each age group who did receive an award that year from the total number of students in each age group who attended the university the academic year previous to the academic year in which the award was made (since in-course scholarship selections being based on GPAs from the academic year previous to the year in which the award is made). For part-time students' scholarships, the number of students in each age group who did not receive an award each year was calculated by subtracting the number of students in each age group who did receive an award that year from the number of students in each age group who were studying part-time at the university in the academic year previous to the academic year in which the

awards was made. Chi-squares were calculated for each class of scholarship for each of the five years being studied.

There is a rational for the choices I made in relation to the data used to complete chi-squares that can be best described through an example. In the case of entrance awards, I used the total number of students entering the university each year from each of the two age groups for comparison in chi-square testing. I did not use the numbers of students entering the university who would be eligible for entrance awards for comparative purposes (i.e. only those entering students from the two age groups either entering directly from high school or from full-time community college who would be studying on a full-time basis). The rational for this choice is that if I had been evaluating whether or not those people who matched the criteria used to allocate entrance awards who were aged less than 25 years and those people who matched the criteria aged 25 years and older had equal access to entrance awards then I would have used this data for comparison purposes. This study is concerned with adult students' access to undergraduate scholarships and as a consequence I decided to use data from the total population of each age group for comparison purposes in order to determine if one age group had a greater chance of winning undergraduate scholarships than the other age group.

Chi-square tests were used to evaluate whether the proportions of adult students and traditional students who received scholarships (entrance, and in-course) were the same. The values placed in to the chi-squares were taken from tables 1, 4, 6, 7 and 8.

The computer program then calculated the value of the chi-square and stated whether or not the distribution was significant. In all cases the distribution was significant. The results of chi-square computations are shown in tables 10, 12 and 14.

Statistical Testing - Entrance Scholarship:

Table 10
Chi-Square Results: Entrance Scholarships

Entrance Scholarships 1999/2000			
	Awarded	Not Awarded	Total
Adult Students	6	539	545
Traditional	264	2322	2586
Total	270	2861	3131

Degrees of freedom: 1

Chi-square = 47.3874027907414

p is less than or equal to 0.001.

The distribution is significant.

Entrance Scholarships 2000/2001			
	Awarded	Not Awarded	Total
Adult Students	7	663	670
Traditional	275	3141	3416
Total	282	3804	4086

Degrees of freedom: 1

Chi-square = 42.7847506352566

p is less than or equal to 0.001.

The distribution is significant.

Entrance Scholarships 2001/2002			
	Awarded	Not Awarded	Total
Adult Students	16	720	736
Traditional	394	2765	3159
Total	410	3485	3895

Degrees of freedom: 1
 Chi-square = 67.2181863372543
 p is less than or equal to 0.001.
 The distribution is significant.

Entrance Scholarships 2002/2003			
	Awarded	Not Awarded	Total
Adult Students	12	658	670
Traditional	571	1996	2567
Total	583	2654	3237

Degrees of freedom: 1
 Chi-square = 150.515170686835
 p is less than or equal to 0.001.
 The distribution is significant.

Entrance Scholarships 2003/2004			
	Awarded	Not Awarded	Total
Adult Students	27	659	686
Traditional	536	2566	3102
Total	563	3225	3788

Degrees of freedom: 1
 Chi-square = 79.0433287530027
 p is less than or equal to 0.001.
 The distribution is significant.

Results of the chi-square testing of entrance scholarship data were interpreted by first transforming data in the chi-squares into percentages: dividing the column entries by the row totals. For example, in the chi-square table that shows entrance scholarship results for the academic year 1999/2000 there were 6 adult students who were recipients out of total of 545 adults students entering the university that year. By dividing the number of recipients by the total number of adult students entering the percentage of adults who obtained an entrance award could be determined. This percentage was

calculated to be 1.08%. The corresponding value for the traditionally aged students was 264/2586 or 10.2% in that year. These figures indicate that in the academic year 1999/2000 traditionally aged students were 10 times more successful than adult students in accessing undergraduate entrance scholarships at the case study university. Table 11 shows the percentages of each age group who were recipients of entrance scholarships in each of the years studied. From this table the disparity between traditionally aged undergraduates success in accessing these awards and adult students' success throughout the study period can be clearly seen.

Table 11

Chi-Square Interpretation: Entrance Awards

Entrance Awards	1999/00	2000/01	2001/02	2002/03	2003/04
% Adults recipients	1.10%	1.04%	2.17%	1.82%	3.93%
% Traditional recipients	10.20%	8.05%	12.47%	22.24%	17.29%

The chi-square test evaluates the null hypothesis that there is no difference between the groups: that the two samples based on age are drawn from the same undergraduate population and if all things are equal in the allocation process of undergraduate scholarships then each age group had the same opportunities to win entrance scholarships. Since the chi-square test showed that the difference was significant, the null hypothesis could be rejected and the conclusion reached that there was a significant difference between the proportions of adult students who were awarded undergraduate entrance scholarships in the academic years from 1999/2000 to 2003/2004

and the proportion of traditionally aged students who were awarded undergraduate entrance scholarships during the same time period.

Statistical Testing – In-Course Scholarships:

Chi-squares were calculated for in-course scholarships for each of the years in the study. In all of the years the chi-square tests showed that the distribution was significant.

Table 12
Chi-Square Results: In-Course Scholarships

In-course scholarships 1999/2000			
	Awarded	Not Awarded	Total
Adults	139	3558	3697
Traditional	641	10646	11287
Total	780	14204	14984

Chi-square = 20.7890075670715

p is less than or equal to 0.001.

The distribution is significant.

In-course scholarships 2000/2001			
	Awarded	Not Awarded	Total
Adults	136	4244	4380
Traditional	721	10403	11124
Total	857	14647	15504

Chi-square = 68.6075985282437

p is less than or equal to 0.001.

The distribution is significant.

In-course scholarships 2001/2002			
	Awarded	Not Awarded	Total
Adults	156	4391	4547
Traditional	767	10738	11505
Total	923	15129	16052

Chi-square = 62.9652662565543
 p is less than or equal to 0.001.
 The distribution is significant.

In-course scholarships 2002/2003			
	Awarded	Not Awarded	Total
Adults	159	3813	3972
Traditional	817	10942	11759
Total	976	14755	15731

Chi-square = 44.2458827561862
 p is less than or equal to 0.001.
 The distribution is significant.

In-course scholarships 2003/2004			
	Awarded	Not Awarded	Total
Adults	159	4397	4556
Traditional	811	10689	11500
Total	970	15086	16056

Chi-square = 72.9502632981556
 p is less than or equal to 0.001.
 The distribution is significant.

Again all chi-square tests of in-course scholarship data indicate that there is a significant difference between the two age groups as recipients of these awards and that as a result the two samples did not come from the same population. Again the null hypothesis could be rejected. Examination of chi-squares percentages for in-course scholarship recipients' (table 13) shows similar results to entrance scholarship recipients

but with the difference that the proportions of students from each of the two age groups receiving awards are less pronounced. However, this reduction in difference of proportions could be attributable to the fact that included in the in-course totals are awards made to part-time students and adult students have more success obtaining these awards than any other class of scholarship available at the case study university (see table 7).

Table 13
Chi-square Interpretation: In-Course Scholarships

In-Course Awards	1999/00	2000/01	2001/02	2002/03	2003/04
Adults Students	3.76%	3.2%	3.43%	4.0%	3.48%
Traditional Students	5.63%	6.48%	6.66%	6.94%	7.05%

Statistical Testing – Part-Time Students’ Scholarships:

Data showing in-course awards made to part-time students were not available from the case study university for the period studied, instead information about recipients of these awards was including in full-time in-course scholarship data for all of the years in the study. However, data showing part-time student scholarship recipients were available for one year not included in the study period, 2004/2005. The chi-square calculations show that the distribution of awards is significant. And the null hypothesis (that the chance of success in obtaining a scholarship award is the same for the two age groups: aged less than 25 years and aged 25 years and older) could therefore be rejected.

Table 14
Chi-Square Results: Part-time Students' Scholarship Recipients

Part-time students awards 2004/2005			
	Awarded	Not Awarded	Total
Adults	31	2559	2590
Traditional	84	2815	2899
Total	115	5374	5489

Chi-square = 19.2872506801317
 p is less than or equal to 0.001.
 The distribution is significant.

Table 15
Chi-Square Interpretation: Part-time Students' Scholarship Recipients

Part-Time Students' Awards	2004/2005
Adult Students	1.19%
Traditional Students	2.89%

Calculation of the proportions of students receiving part-time students' scholarships during this year (table 15) shows that 1.19% of adult students were recipients of these awards and 2.89% of traditionally aged students were recipients. These proportions are closer than the proportions calculated for either entrance or in-course scholarships, but they still reveal that traditionally aged students are more likely to be awarded part-time student scholarships than adults students. One possible explanation for the different success rates for adult student as recipients of part-time students' scholarships is academic ability and another is the criteria used to award these scholarships. Since academic ability has been shown from data results (table 9) to be the similar for both age groups, this explanation must be discounted. Criteria used to select

recipients for these awards must offer an explanation of the different success rates. Eligibility criteria requires recipients to be in the top 3% of part-time students in each faculty and to have completed between 9 (60% course load) and 14.99 (less than 100% course load) course credits in a year (see page 72). The case study university does not prepare reports showing the age of full and part-time students by faculty so it is not possible to determine if adult students are present as part-time students in each faculty in similar proportions or if they are more likely to be present as part-time students in some faculties rather than others. If this latter is the case, then it might offer an explanation of why adult students are awarded fewer part-time scholarship than traditionally aged students. Alternatively, course load requirements might offer an explanation. Since the review of literature indicates that adult students are likely to be able to afford only a small number of courses each semester (Bosworth & Choitz, 2002; Fairchild, 2003, Kasworm, 2003) it might be that the number of courses taken by adult students at the case study university on average is less than the number of courses required by eligibility criteria. However, it is not possible to determine if one age group rather than the other is more likely to take the required number of courses to be eligible for part-time students' scholarships because data from the university quantifies students as part-time if they take less than 100% course load and does not distinguish those who take more of less than 60% course load by age.

In reviewing all results of chi-square testing, since academic ability (which is the only variable that could explain the differing success rate of the two age groups if all things were equal) is similar in the two age groups, then eligibility criteria must be

considered as the factor that most influences the differing allocation of awards to the two different age groups. In considering eligibility criteria used in allocation of undergraduate scholarships at the case study university in relation to the literature review showing differences in the lives of adult undergraduate students that influence their entry into university education and their study habits (for example: Campbell, 1993; Davey and Jamieson, 2003; Fairchild, 2000; Home, 1997; Kasworm, 2003; Murphy, 1998; Wilson and Rosen, 1999), the general eligibility criteria used by the case study university can be seen to not reflect the different circumstances of adult students (particularly adult women students), but instead to reflect norms traditionally associated with undergraduate education: male, full-time students entering university directly after competing high school education and a lack of support for diverse students within the case study university's undergraduate community can be identified.

Survey Findings:

Surveys were sent to about thirty Directors of Financial Aid at Canadian universities. Responses were received from ten. The aim of the survey was to determine if similar eligibility criteria to that used at the case study university existed at other universities and, by implication, if similar results might be anticipated at other universities. The ten universities that responded comprised: one university classified in Maclean's guide to Canadian universities (2005) as "medical doctoral", that is universities with a broad range of Ph.D. programs and research, as well as medical schools; six universities classified similarly to the case study university by Maclean's (2005) as "comprehensive", and three universities classified as "primarily

undergraduate”, that is largely focused on undergraduate education, with relatively few graduate programs (Maclean’s 2005).

Survey questions asked about general eligibility criteria for entrance scholarships, in-course scholarships and part-time students’ scholarships, and then opinions of the respondents on how these general eligibility criteria came about; if adult students had equal access to undergraduate scholarships; if the university prepared reports that showed the ages of recipients of undergraduate scholarships; and, as a follow-up question, if the respondent would be able to provide empirical data showing ages of recipients of the undergraduate scholarships offered at her/his university (see Appendix A). Some issues relating to terminology I had used in the survey became apparent as I read the survey responses (these were most often associated with a distinction I had made between renewable and non-renewable entrance scholarships, with terminology used to describe students entering universities from community colleges, and with whether or not applications were required for scholarships). As a result of differences in interpretation of survey questions on these topics I could not quantify the responses and as a result I have not reported replies to these questions in findings from the survey and have not drawn any inferences from these survey responses.

Entrance Scholarships:

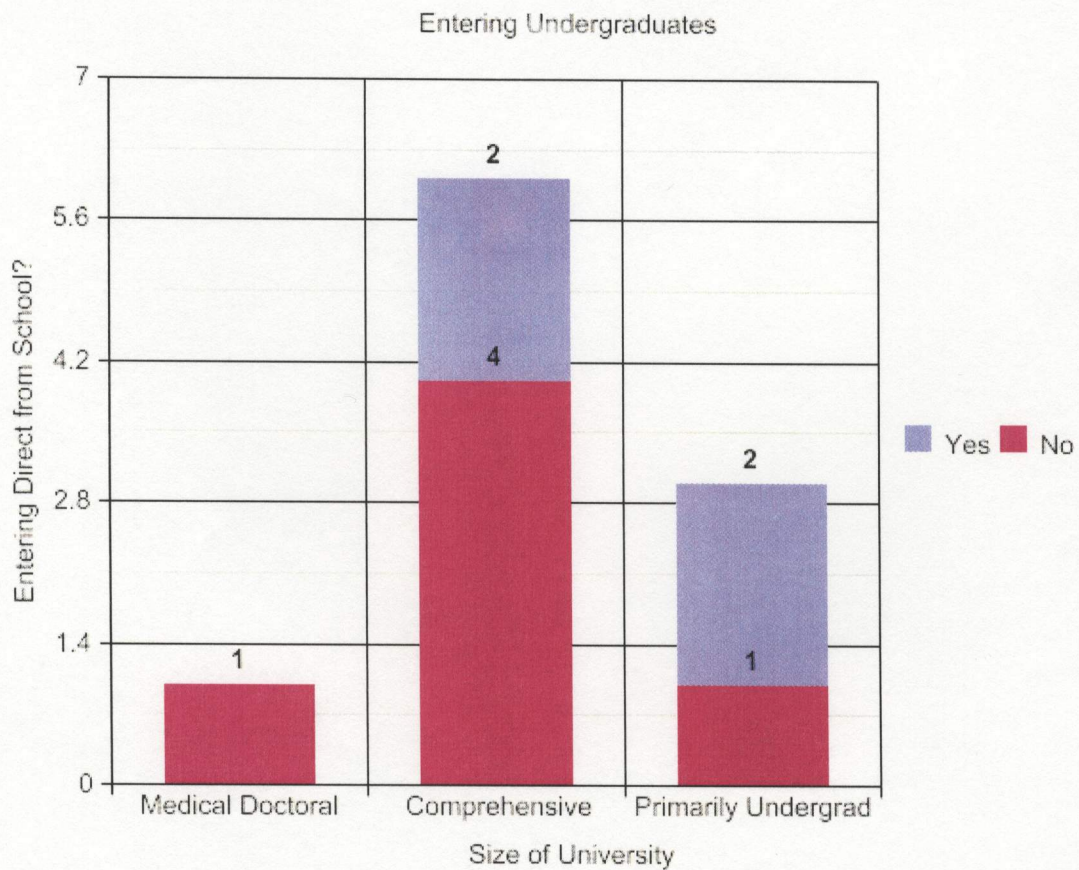
All ten universities reported that they offered undergraduate entrance scholarships. The survey asked if there was a requirement that recipients of entrance scholarships had to be entering university directly from high school: four replies stated

that they did and six replies stated that they did not. A break down of responses by size of university is shown in Figure 3. Some respondents included additional information with their replies. For example one university that stated entrance awards were only available to students entering directly from high school mentioned that if a student had taken a year off to complete a recognized volunteer activity then they would still be eligible for an entrance award, another stated that even though most entrance scholarships were available only to students entering directly from high school there were two entrance scholarships specifically available to adult students, and one university that stated there was no requirement that recipients of entrance awards be entering the university directly from high school listed the groups of students who were excluded from eligibility for entrance scholarships and these included part-time students, mature students, international students and transfer students.

These findings show that even though the case study university's eligibility criteria for entrance scholarships might not be typical of eligibility criteria for entrance scholarships at other Canadian universities eligibility criteria might result in similar allocation of these awards across the two age groups at these institutions because half of the universities surveyed either made entrance awards only available to traditionally aged students entering the university directly from high school or specifically excluded adult students as a group from eligibility for these awards. However, without quantitative data it is only possible to speculate that similar results to the case study university might occur at many other Canadian universities.

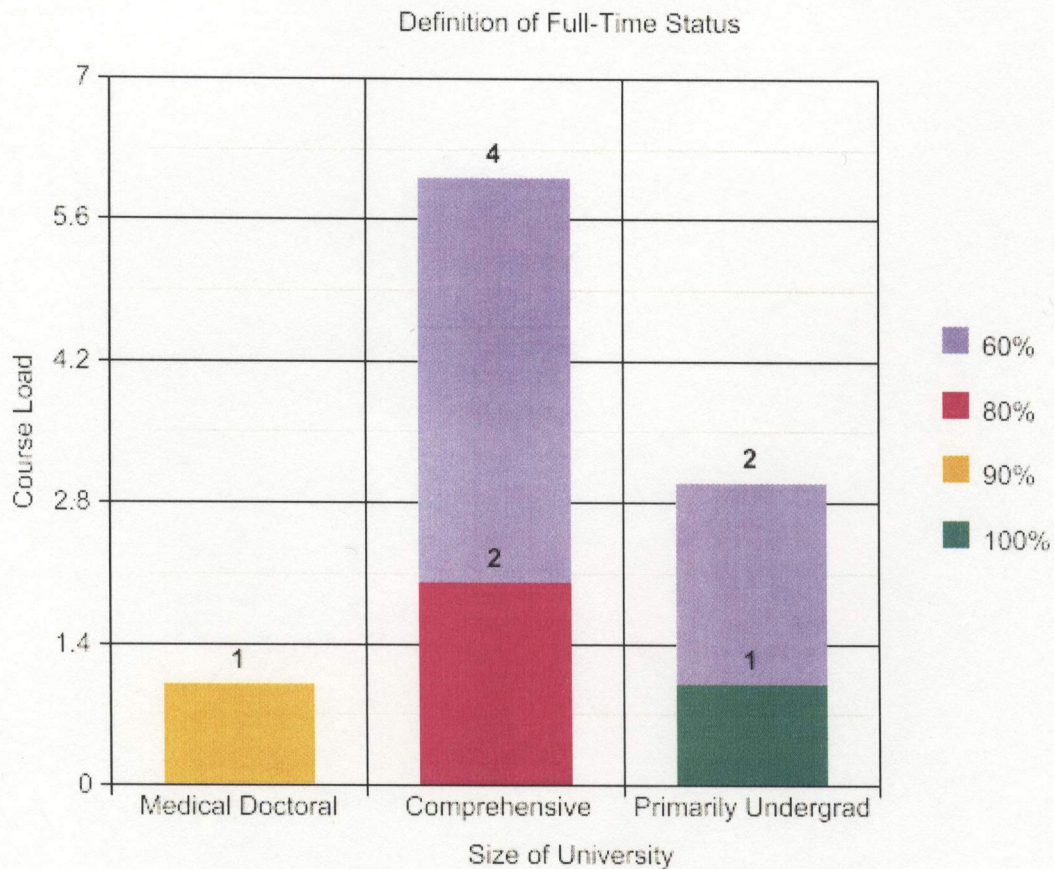
Of the six universities that did not require entrance award recipients to be entering directly from high school, two responded that the majority of these awards were still made to high school direct entrants because there were a large number of students entering the university each September directly from high school. (However, findings from the case study university might discount this suggestion because they showed that at that university students entering directly from high school only constituted about 1/3rd of all entering students – see table 4.)

**Figure 3:
Policies that Specify Awards Made to Undergraduates Entering Universities
Directly from High School**



One other respondent commented that her/his university offered admission and admission scholarships twice a year and in January the majority of entrance scholarships were awarded to college entrants. And one of these six respondents stated that all students entering her/his university were evaluated for entrance scholarships based on either their high school graduation grades or their college grades regardless of the year in which these grades were obtained and as a result all entrance awards were open to all entering students.

**Figure 4:
Full Time Status Definitions**



This one university seems to demonstrate an open approach to entrance awards and it would be very interesting to gather quantitative data to compare rates of adult student

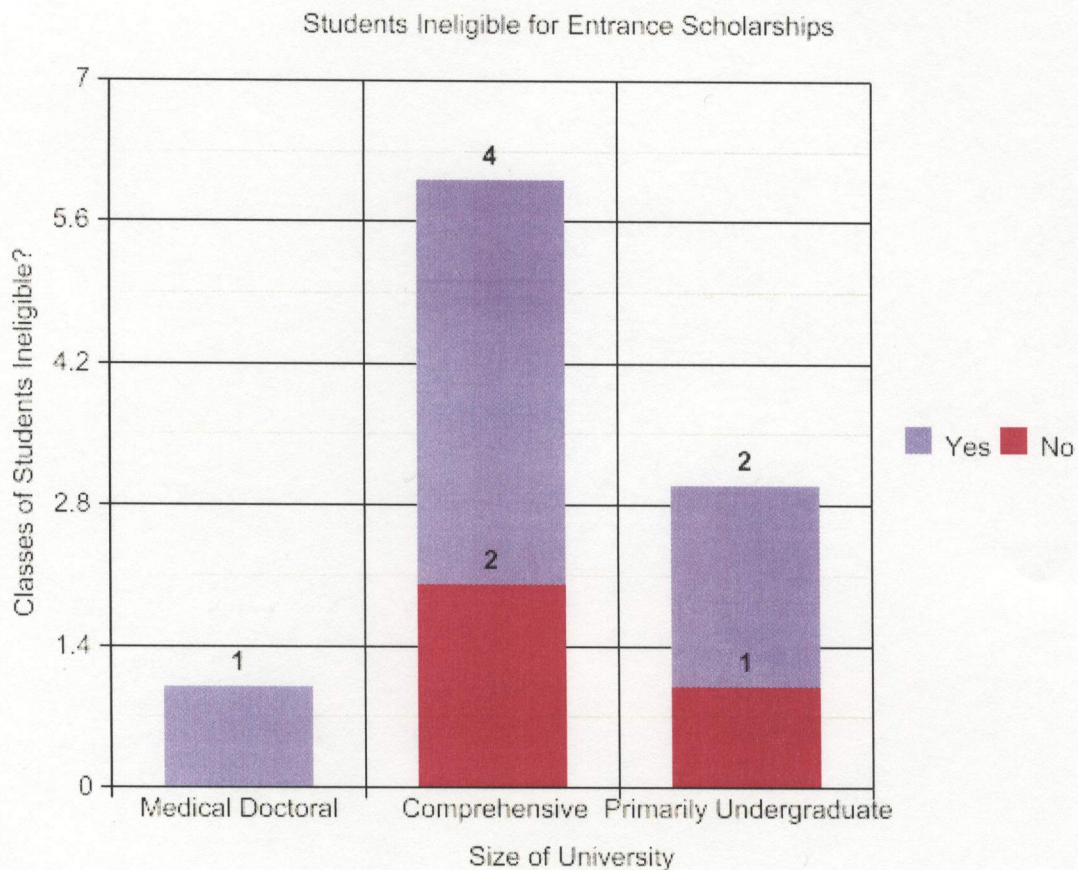
recipients at this university with the case study university. However, such data were not made available for this study.

All ten universities responded that entrance scholarships were only available to students entering full-time study. However, there was inconsistency among the universities around the definition of full-time: six universities defined full time as completing 60% or more course load, two defined it as completing 80% or more course load, one defined it as completing 90% or more course load, and one defined it as completing 100% course load (see Figure 4 for breakdown by size of university). The case study university defines full-time study as 100% course load and this definition is shared by only one of the ten responding universities. The majority of the universities surveyed defined full-time as 60% or more course load.

The survey asked if any classes of students were ineligible for entrance scholarships: seven respondents stated that some classes of students were ineligible for entrance awards and three stated that none were ineligible responses by size of university are shown on Figure 5. Where classes of students were ineligible, classes cited and their frequencies were: part-time students (6 times), transfer students (4 times), international students (3 times), and mature students (2 times). Some classes of students excluded (part-time and those who might be transferring from colleges) are classes that would exclude adult students even if they were not specifically named as an excluded class. Of the three universities that stated that no classes of students were excluded from entrance awards one made entrance awards open to all entering students based on past high school

or college grades, one had some entrance scholarships that were specifically available to mature students, and the last had some entrance scholarships that were specifically available to international and part-time (in this case less than 80% course load) students. Only one university responded that entrance awards were only available to full-time (100% course load) students entering directly from high school: requirements that are very similar to the eligibility criteria for most entrance awards at the case study university.

**Figure 5:
Specific Groups of Students Excluded from Eligibility**

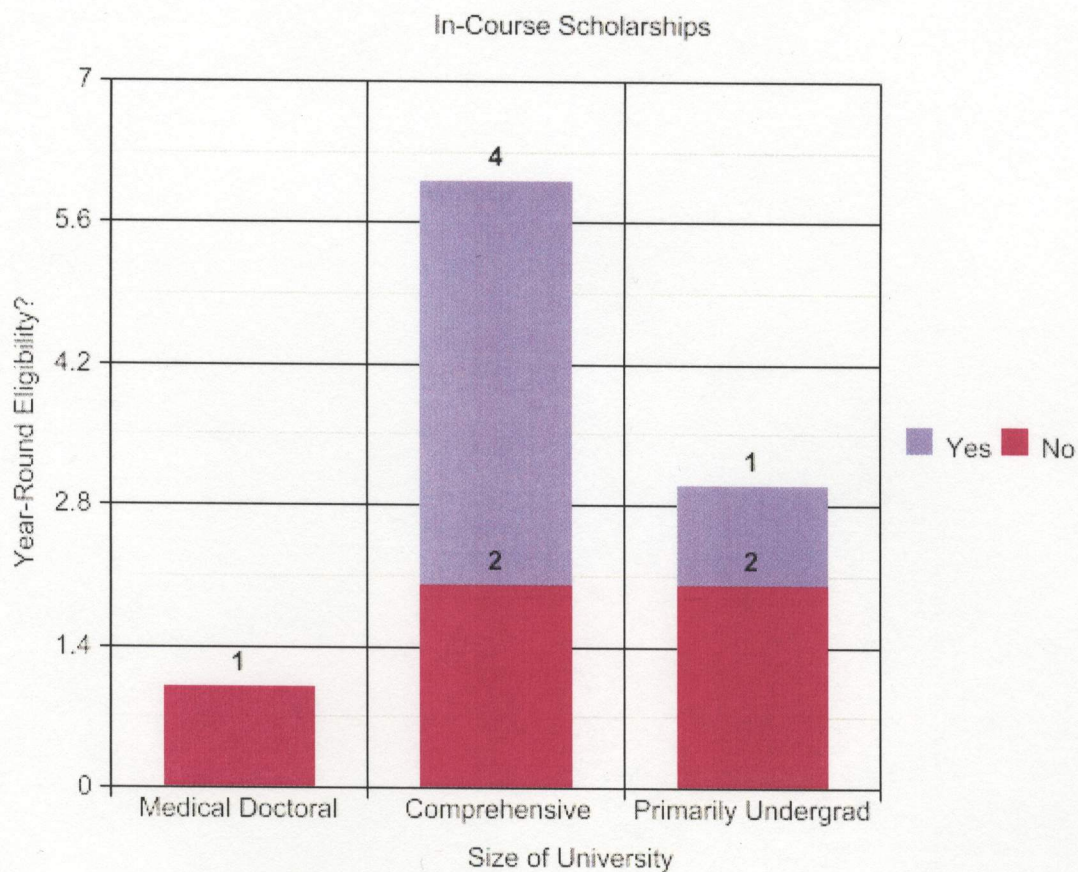


Findings from these survey responses indicate that eligibility for entrance awards at some universities might be more open to all entering students, regardless of age, pathway to education and study habit, and that as a result they might offer more opportunities not only for adult students to access entrance awards but also for undergraduates of any age who make different choices from those traditionally associated with undergraduate education to access entrance awards when entering university. However, without data to quantify this statement it is based purely of conjecture.

In-Course Scholarships:

All ten of the universities offered in-course scholarships to undergraduates and all ten made these awards available to full-time students based on the course load requirements that defined full-time at each university (see Figure 4). Since literature on adult students has indicated that adults student may have limited opportunities to study or limited money available to finance their education and so choose to take only a few courses a semester (Bosworth, & Choitz, 2002; Fairchild, 2003; Kasworm, 2003), the survey asked if eligibility for in-course scholarships allowed courses to be completed year round rather than just between September and April. Five of the universities replies stated that course could be taken year round (this figure included four universities that defined full-time as 60% course load and one that defined it as 80% course load) and five required recipients to complete the required studies between September and April. Responses by size of university are shown in Figure 6.

**Figure 6:
Eligibility for In-Course Scholarships**

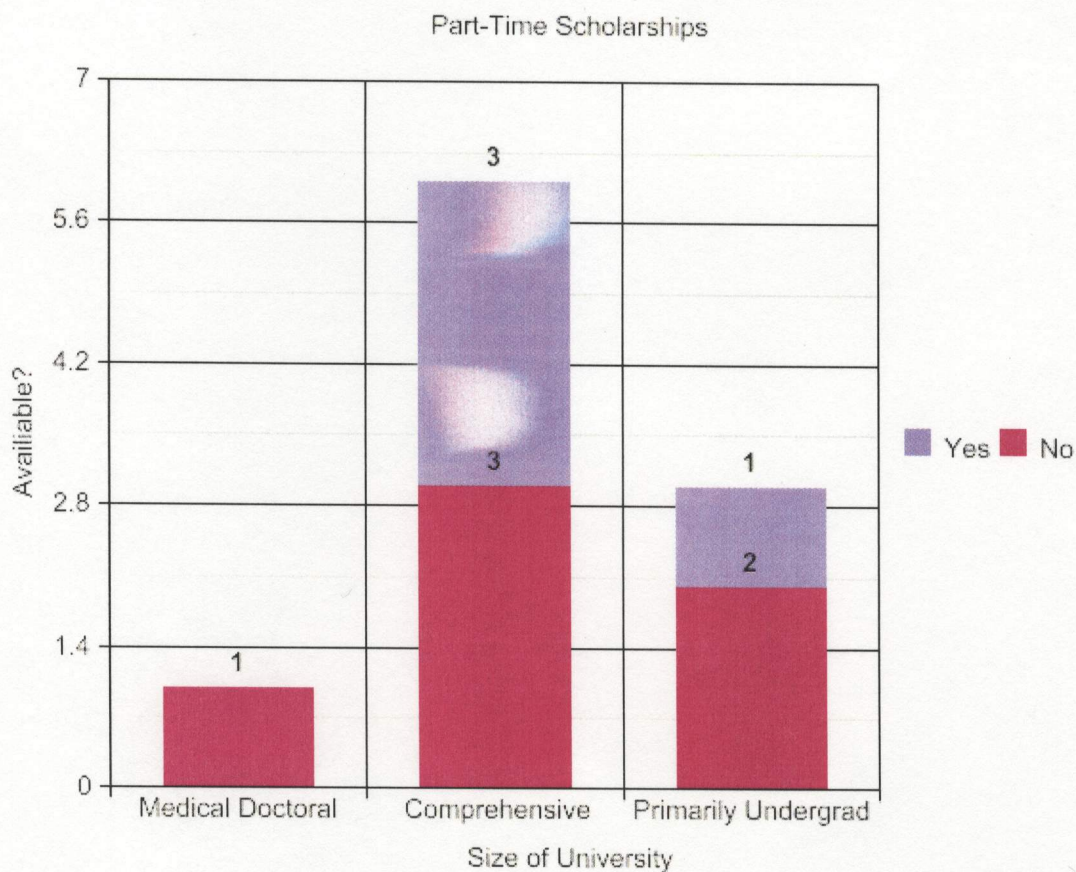


Findings indicate that the requirement of the case study university that recipients of in-course awards complete their courses in the academic between September and April are not unusual at Canadian universities. And findings indicate that the majority of universities surveyed might make in-course scholarships more accessible to adult students because they do not require the same number of courses to be completed each year as the case study university for students to be classified as full-time.

Part-Time Students' Scholarships:

Findings from the survey indicate that part-time students' scholarships are not commonly available at Canadian universities. Of the ten that completed the survey, only four offered these awards and it was also noted by some respondents that the numbers of these awards offered was very small. Responses by size of university are shown in Figure 7. Of the four universities where scholarships were available to part-time students

**Figure 7:
Availability of Part-Time Scholarships**



the lower and upper course loads at which these awards were made was between 20-60% at three of the universities and between 20-80% at one. The lower level of course load (20%) required by these universities might result in increased adult students' access to

these awards because such eligibility requirements would allow students completing a modest number of university courses to be candidates for part-time student scholarship. Such eligibility requirements might make scholarships more available to adult students who use discretionary income to complete one or two courses a year (Bosworth & Choitz, 2002). These requirements indicate that the realities of lives of adult students might have been considered when these eligibility criteria were developed. However, without quantitative data it is not possible to determine if adult students have equal access to these awards. The case study university's requirement of 60-99% course load for part

Survey responses to questions about eligibility criteria for entrance, in-course, and part-time students' scholarships have been plotted as stacked bar graphs so that similarities and differences between the universities based on size and purpose can be easily identified, and so that similarities and differences between the case study university and the other comprehensive universities surveyed can be highlighted.

Opinions of Respondents:

The survey asked if the respondents had any knowledge about how the eligibility criteria used in the allocation of undergraduate scholarships came about. Four respondents stated that they had no knowledge; two stated that policies had been in place for many years; and four stated that they had been developed by awards committees and approved by Senate. In retrospect this question might not have been worded as clearly as I had intended. I had hoped to get a sense of the thinking behind the policies, how long they had been in place and if they were regularly reviewed. I had hoped for this

information because I had been unable to discover how, when, and why the eligibility criteria at the case study university had been developed, and whether or not any changes had been made to these criteria over time. Senior administrators at the case study university had informed me that case study's allocation policies had been in place when they started working at the university – in one case this was over twenty years ago – and that although eligibility criteria had been discussed in committee meetings over those years they had not been changed. The responses to the survey also did not indicate how eligibility policies had been established and what was the objective of these criteria. However, I did get a sense from reading the responses of how distant (and this is not just in terms of time) were Financial Aid Directors who administered undergraduate scholarships from the institutional structures that developed the eligibility criteria for these awards.

The survey next asked if in the opinion of the person completing the survey, adult students had equal access to undergraduate scholarships. All ten respondents answered this question: nine responded that they believed adult students had equal access and four qualified this "yes" response in some way. The one respondent who stated that adult students did not have equal access to undergraduate scholarships did not qualify her/his response. This respondent was from the one university that had eligibility criteria for scholarships that was similar to the case study university: 100% case load and awards made only to students entering directly from high school. Of the four respondents who qualified their "yes" response, one stated adults had equal access to in-course scholarships only; one stated that adult students had equal access if they were taking a

full-time course load (a university that specifically excludes part-time and transfer students from entrance awards and defines full-time as 80% or more course load); one stated that adults did not have equal access to entrance awards but did have equal access to in-course scholarships (60% course load); and the last stated that if it were true that fewer adults studied full-time then there could be systemic discrimination against adult students in the awards program at her/his university.

Three respondents also rationalized why they felt that adult students had equal access to undergraduate scholarships. One respondent stated that because awards were based on grades and were open to all full-time students, then adults were competing on an equal footing with all other students. This response suggests notions of formal equality of scholarship provisions at the respondent's university, as the respondent does not appear to consider the different circumstances of adult students' lives that might exclude many potential recipients. Some other responses also suggested formal equality. One respondent stated that adults had equal access to all scholarships because "adult" status was not used as a criterion in allocating awards. This view, which implies that since age was not a determinant of eligibility then it would not exclude, fails to recognise the differences of adult students. Finally, one response questioned whether scholarships should be awarded to students who do not complete undergraduate education in a timely manner, no matter how meritorious, because such lengthy funding would be onerous on the institution. This response is interesting in that it views undergraduate scholarship provisions entirely only from the university's perspective and fails to consider that lengthy study might also be onerous on students. It also conveys an impression that part-

time students who are awarded scholarships are manipulating the scholarship system in much the same way that welfare recipients are often portrayed in the media as milking the social support system. Finally, it fails to recognize that those students who complete their studies over a protracted period of time might lack the finances to do otherwise but with scholarship assistance they might be able to complete more courses each year and thereby finish their programs in a timely manner.

One respondent provided a suggestion about how adult students' access to scholarships could be made more equitable. S/he stated that s/he knew of another university where scholarship eligibility was based on students completing ten courses (that is the number of course that would be equivalent to a full academic year's course load) regardless of how long it took students to complete this number of courses. Every time a student completed ten courses that student would become eligible for an in-course award based on her/his grade point average. This system would simplify in-course scholarships by removing barriers created by distinguishing between full-time and part-time students and open these scholarships up to a larger group of potential recipients. None of the respondents made specific suggestions about how access to entrance scholarships could be made more equitable for adult students, but some reported practices (such as basing awards on entering grades regardless of when grades were achieved and/or reviewing definitions of full-time and part-time students) which might have the effect of providing increased access to entrance scholarship opportunities to adult students.

The final question on the survey asked if the university prepared reports showing the age of recipients of undergraduate scholarship recipients. This question was asked to try to assess if the provision of scholarships to adult students was an issue that was being monitored at the universities surveyed. Replies indicated that none of the universities prepared these reports and therefore the assumption can be made that none of the universities were monitoring adult students success rates. The case study university also did not prepare such reports. Since none of the universities that took part in this study in any way had any knowledge of adult students' access to undergraduate scholarships on which to base any claims made by the majority of these institutions about adult students, then these claims could be taken to perceptions rather than facts. Finally, responses to the question about whether reports showing age of scholarship recipients were prepared indicate that diversity within undergraduate populations based on age is overlooked. Since age diversity is overlooked then an assumption might also be made that equity within opportunities, for those who do not fit the age range traditionally associated with undergraduate education, might also be overlooked.

Chapter 5

Conclusions

Summary of Key Findings:

This research clearly demonstrates that the effects of policies governing the distribution of undergraduate scholarships at the case study university are discriminatory. Findings from statistical testing of data collected by the case study university show that there is a significant difference in the allocation of all undergraduate scholarships such that recipients from the two age groups (aged less than 25 years and aged 25 years and older) cannot be said to come from the same population of undergraduate students. Since the academic abilities displayed by adult students are similar to, if not better than, those displayed by traditionally aged undergraduates (in terms of proportions of adult students with high GPAs compared to proportion of traditionally aged students with GPAs within the same range – see table 8), then, since there are no other competing explanations that would explain the statistical differences, eligibility criteria must favour traditionally aged undergraduates over adult undergraduates. Entrance scholarship findings show that a minority group of entering students to which adult students cannot possibly belong (those entering the university directly from high school) is favoured in the general eligibility policies for these awards. The result of favouring this minority group is that the majority of entrance awards (which are the most lucrative of all undergraduate scholarships) are awarded to traditionally aged undergraduates. Traditionally aged students are also favoured by eligibility criteria used to determine recipients of in-course merit-based scholarships: the requirement that recipients be full-time students (100% course load),

when the majority of adult students (60% or more – see table 2) at the case study university study are part-time students results in only a minority of the adult group being eligible for these awards. Analysis of data showing age of recipients reveals that adult students are significantly less likely to be successful recipients of all classes of undergraduate scholarships awarded by the case study university, including awards to part-time students.

The value of part-time students' scholarship at the case study university is much lower than value of scholarships made to full-time students and there are far fewer part-time students' awards than full-time students' awards. However, because some special provisions were available to students who studied part-time and because proportionally almost equal numbers of adult students and traditionally aged students study on a part-time basis at the university (see table 2) I expected that analysis of data showing the age of recipients of part-time students' scholarships recipients would reveal that adult students had equal access to this class of award. However, although adult students were awarded a higher proportion of part-time students' scholarships than any other class of award, traditionally aged students were still found to be recipients of these awards at levels that are about twice the rate of adult students (see table 15). Since findings have shown that academic ability is similar across the two age groups studied and since applications are not required to be considered for these awards, then eligibility criteria has to be the factor limiting adult students access to undergraduate scholarships at the case study university. Course loads used in the selection of recipients might not reflect the course loads typically chosen by adult students and so

might favour younger students. However, because data on course levels are not linked to age it is impossible to tell if this is the case or not at the case study university.

An examination of the eligibility criteria used to determine recipients of all undergraduate scholarships at the case study university indicates that they may not recognise that adult students' engagement in undergraduate education is different from traditionally aged students. This can be seen in the requirement that recipients of entrance scholarships be entering the university directly from high school, a requirement that is impossible for adult students group to match, or be entering full-time study directly from full-time community college study which also is difficult for many adult students to match not only because the majority of adult students (about two thirds) are part-time students (see table 2), but also because adult students enter university from many different stages in their lives and so will not necessarily be entering directly after completing community college (Kasworm, 2004). And, while some general eligibility requirements might also exclude traditionally aged students from scholarship provisions as well as adult students, the exclusion effect is greater for adult students by proportion than it is for traditionally aged students. For example the general requirement that recipients of in-course scholarships must be full-time students excludes by far the majority of adult students (over 60% each year) from these provisions but only about 25% of traditionally aged students.

Findings from the survey show that eligibility criteria are used to determine undergraduate scholarship recipients at all of the ten Canadian universities surveyed.

Whilst these criteria might not be exactly the same as those used at the case study university, survey results show that these criteria might also adversely impact adult students' abilities to access scholarship provisions at many of these universities. For example in the case of entrance awards, although only one university required recipients to be entering directly from high school and completing 100% course load (criteria that match those of the case study university), about half of the universities surveyed required recipients to be entering directly from high school and many of those who did not, had in place policies that specifically excluded those classes of students to which adult students would be most likely to belong (mature, part-time and transfer). In the case of in-course scholarships, the majority of the universities surveyed had in place less stringent definitions of "full-time" studies than the case study university. However, since the 60% or more course load used at more than half of the universities surveyed to define "full-time" matched the course load used by the case study university to define "part-time", and since findings have shown that part-time traditionally aged undergraduates at the case study university are awarded proportionally about twice as many part-time students' scholarships as adult students, then it still might be that even at the 60% course load level adults do not have equal access to undergraduate scholarships.

Opinions expressed by the respondents to the survey highlighted how many Financial Aid Directors (nine out of the ten respondents) maintained that adult students had equal access to undergraduate scholarship provisions even though the eligibility criteria used to select recipients for these awards at their universities either excluded adult students or set requirements that many adult students could not match. Considering these responses

brought to mind Young's description of how oppression as a structural concept can be seen in "systemic restraints" on group members and in the "embedded...unquestioned norms, habits and...assumptions underlying institutional rules and the collective consequences of following these rules" (1990, p. 41). And, when the responses to this survey question are compared to the responses to the question about whether or not the university prepares reports showing ages of recipients of scholarship awards, the findings of Sissel, Birdsong, and Silaski's (1997) are brought to mind. Sissels et al. found that, although the educational institutions they studied ignored age as a demographic, administrators were adamant that no difference existed between adult students and traditionally aged students.

The survey did discover some alternative ways of allocating scholarship awards that might be of interest to university administrators interested in reviewing eligibility policies. One that was mentioned by one of the respondents (making all students eligible for awards each time they complete the number of courses associated with 100% course load regardless of how long it takes to complete these courses) stands out as having the potential to make access to in-course undergraduate scholarships open and equal to all students. Such provisions would allow scholarships to be awarded on academic merit alone and not on a combination of academic merit and eligibility criteria. The opening up of entrance awards to all students might be less easy to achieve. But if all entering students were evaluated for these awards based on their entering grades regardless of when these grades were achieved, as was noted in one response to the survey, then some adult students entering undergraduate education at the university might have an increased chance to access entrance scholarships. Finally, one university made mention of entrance

scholarships that were specifically intended for adult students. The provision of scholarships specific to the adult student undergraduate community would create some opportunities and might reduce, albeit to a very limited extent, the disparity between awards made to traditionally aged students and awards made to adult students. Although it was not possible to complete a gender analysis of data at the case study, there is some indication that adult women students are the group most likely to be part-time students and thereby the group most likely to be excluded from eligibility for undergraduate scholarship. The creation of entrance scholarships specifically for adult women undertaking part-time study might make some contribution towards rectifying the disproportionate exclusion that members of this group currently face in accessing undergraduate scholarships.

Finally, findings from this study highlight how when people engage in an activity and they become defined as members of a group in terms of how the group has always been defined (Young, 1990), then the dominant membership of the group is taken as the reference point from which services for group members are planned. And they also show how not only are those who do not fit the norms of the dominant group most often excluded from the provisions but also that these exclusions are commonly overlooked and/or denied. This study is framed by understanding of the relational difference of adults as undergraduate students and by notions of formal equality and substantive equality. Young (1990) holds the view that the effect of relational differences in group settings is the oppression and marginalisation of those members of groups who are different from the dominant majority. In the case of undergraduate scholarship allocation

policies, Young's understanding of oppression as a concept structurally embedded in institutions can be identified in the unquestioned application of eligibility criteria (and the normative values they reflect) used in the selection of candidates for these scholarship awards at the case study university and at the ten other universities surveyed. Young's description of cultural oppression can be seen in the unnoticed exclusion of a significant proportion of university undergraduate communities from scholarship provisions by eligibility criteria developed with the dominant group in mind, and in the defensiveness expressed by some of the survey respondents to a suggestion that adult students might not have equal access to these provisions. And Young's (1990) concept of the "other" as being invisible to the dominant group, can be seen in the fact that none of the universities in this study prepared reports showing the age of recipients of undergraduate scholarships and as a consequence none had ever been able to give any consideration to whether or not adult students had equal access to these awards.

Findings show that because eligibility criteria reflect the norms traditionally associated with undergraduate education, adult students are excluded in high proportions from scholarship provisions and that even when the number of these awards is significantly increased there is still only a slim chance that adult students will be able to access university-administered merit-based undergraduate scholarships because eligibility criteria limits their access to them. However, nine out of ten of the Directors of Financial Aid surveyed still believe that adult students have equal access to undergraduate scholarships because they are open to those who fit the rules. Such reasoning suggests that the concept of formal equality underlies scholarship provisions

because eligibility criteria assume that all undergraduates are the same. Findings from the case study and from the survey show that when rules about scholarship allocation assume that formal equality provisions are in place they go unquestioned, and even defended by those who administer the rules. And that even when it is apparent that large numbers of the undergraduate population must be excluded from provisions because of their substantive differences, these exclusions still go unnoticed and, as a result, unaddressed. By examining a group of non-traditional students that can be easily identified in university records by their age, the effect of policies developed with the traditional notion of undergraduates in mind has been identified in this study and the outcome of these policies for those who do not match notions traditionally associated with undergraduate education has been measured.

Discussion:

This study clearly demonstrates that despite egalitarian ideals often associated with university-administered merit-based undergraduate scholarships, these valuable awards are in fact funnelled towards traditionally aged undergraduates and that adult students are disproportionately disadvantaged in this process. These findings are particularly significant for the case study university when considered in relation to its strategic plan centred on equity and diversity: findings highlight the gap that exists between intent and practice when administrative mechanisms that could monitor differing outcomes are missing.

The question that readily comes to mind when reviewing findings from the study is: why are adult students disadvantaged in undergraduate scholarship allocation? One explanation might be found in historical traditions associated with university education and practices that were put in place many years ago that have continued unnoticed to today. Young (1990) in her writing describes how everyday practices that have the effect of marginalising or oppressing some members of social groups often go unnoticed overtime. Since adults are not a group traditionally associated with undergraduate education it might be that the provisions put in place in the past to select recipients for undergraduate scholarships have just remained unchanged over time and that even though these practices has resulted in the exclusion of the majority of adult students from scholarship awards their exclusion is simply an oversight. However, is this a likely explanation when changes in the age composition of undergraduate communities in Canada started to occur over sixty years ago (Bowl, 2001; Keast, 2000; O'Heron, 1997)? One would expect that over that time period, with the growing significance of scholarship provisions to Canadian universities (Tamburri, 2004), some demographic tracking of recipients would have occurred.

Gucciardi (2004) offers another explanation in her writing that examines Canada's merit-based scholarships and questions whether scholarships are in fact intended to be egalitarian recognition of academic excellence. Gucciardi believes that the original purpose of scholarships – to recognize excellence – has been eclipsed by institutional goals of attracting top students. Winston (1996) discusses why universities might use scholarship funding to attract top students by describing how universities'

scholarships result from business practices that part resemble charity and part resemble car dealerships. Winston explains that universities need to establish reputations associated with high academic standards to attract top students, because it is the presence of top students that attracts not only more students but also research funding from industries and governments. The implication of this view of scholarships is that images associated with dynamic, academically gifted students who are rewarded through undergraduate scholarships provisions might not accompany adult students in their university education, and as a result, adult students might not be courted by educational institutions. Such an implication might be based more on lingering negative discriminatory stereotypes associated with adults' engagement in university education (Sissel et al. 1997) than on quantifiable findings about adult students high academic achievement (Kasworm, 1990), and the added value that they bring to the classroom through their presence (Darkenwald & Novak, 1997).

This consideration of why adult students might be disadvantaged in scholarship allocation leads me back to the starting point for this thesis: to look again at my understanding of undergraduate scholarships as being egalitarian in nature. Now I wonder if I might have been naïve in this belief and I question whether the opinion expressed by Kasworm's (1996) participants that "scholarships are set up to actively *discriminate* against adult students" (1996, p.55) might contain more truth than I have ever found it possible to consider.

Whatever the reason, the issue that this examination of undergraduate scholarship eligibility criteria and recipients has identified is that adult students' are disadvantaged in the allocation of these awards. Why they are disadvantaged can only be speculated on and how they have continued to be disadvantaged over time is a topic that might lend itself to further research. Brief consideration of the finding of this study framed by Young's (1990) theoretical understanding of relational difference suggests that assumptions made about academic giftedness might confine this quality to traditionally aged students and not ascribe it to adult students. As Sissel et al. (1997) note meritocracy is a quality not generally associated with the negative educational experiences assumed to accompany adults when they return to education. When adults become the "other" in university settings they are viewed as both different and inferior (Young, 1990) and therefore not worthy of the rewards that come through scholarship provisions.

Limits to the Study:

I became interested in the topic of this thesis when I returned to university education as an adult and I compared my experiences as a traditionally aged student with my experiences as an adult student and recognised how out of place I felt. I did not fit into the university and I thought that this lack of fit could not simply be explained away as something in which I myself was complicit. I decided to investigate the allocation of undergraduate scholarship awards in this thesis because I saw eligibility criteria for these awards as one instance where quantifiable evidence could easily be gathered that would clearly show that adult students are treated differently within university undergraduate

education. This study therefore has its basis in my own bias. To compensate for this bias I designed my research so that I would have no part in the gathering of data and so I could not influence findings. All data presented in this study could be replicated by anyone with access to university undergraduate scholarship information.

However, during the time I spent researching and writing this thesis there were many times when I wished I could have had unrestricted access to the case study university's records so that I could check data and research aspects of the allocation eligibility criteria in finer detail. But I am an outsider to the university administration and this status imposed limits on this study. My status as an outsider meant that I did not understand the workings of Financial Aid departments; I did not have knowledge of issues related to my thesis topic that been discussed in awards committee meetings; and I did not know what records were available that could be used to gather data. This study is also limited by my lack of understanding of statistics; a lack of academic literature examining issues relating to university financial aid; and a lack of data specifically related to adult undergraduate students.

Finally, my choice of methodology, a detailed investigation of undergraduate scholarship allocation policies and the outcomes of these policies at only one Canadian university, in itself limits the extent to which "lessons from the case study can advance knowledge and understanding of a given topic" (Yin, 1994, p.3). By undertaking a single setting case study this study has increased knowledge about this particular university's undergraduate scholarship allocation policies and the outcome of these policies for adult

students. It might also have increased knowledge about undergraduate scholarships and about how they are awarded in general, however, the outcome for adult students has really only been quantified in one setting. Responses to the survey indicate that findings *might* be generalizable to other Canadian, or perhaps even other North American, settings. But equally they might not be. Some evidence exists from the survey that the eligibility criteria used by the case study university to allocate undergraduate scholarship is similar to that used by other Canadian universities, but there are differences and these are not only differences from the case study university but also differences among the surveyed universities themselves. Without quantitative data gathered at a number of different Canadian universities that are comparable it is only possible to make speculative assumptions about whether or not the same results would likely be found in other settings.

Implications of Finding:

Findings from this study have implications for adult students, Financial Aid Directors, and university administrators. This study raises awareness of the significance of adult students within undergraduate communities, the issues they face in accessing undergraduate education, and the benefits that they could derive from increased access to undergraduate scholarship awards. For adult students reading this study, findings demonstrate that despite the high levels of academic achievement of adult students there are institutional barriers in place that restrict adult students' access to undergraduate scholarships. The implication of this study for adult students is recognition that adult students do not fail to be awarded undergraduate scholarships because they do not have

the academic ability to do so, instead they are excluded from these award through policies that have the effect of funnelling them toward younger students. For Directors of Financial Aid reading this study, findings show not only how the realities of adult students are overlooked in scholarship provisions but also how these provisions are designed to be reflective of traditional notions associated with undergraduate education. Survey data reported suggest minor changes that might be made to eligibility criteria that might have significant beneficial implications for adult students. Finally, for university administrators findings from this study of just one provision of one of the services commonly available to undergraduate students at Canadian universities might suggest that if age analysis of other services were conducted then other areas where adult students encounter limited opportunities might be identified so that they could be addressed. And addressing limited opportunities for adult students might have implications for university enrolment and retention of students, issues that are of significance to university administrators.

Recommendations Arising Out of this Study:

- Recognise that equity within undergraduate education extends beyond admissions: that the circumstances that make some students different accompany them throughout their study.
- Develop monitoring procedures for all university-administered services to ensure that the different circumstances of diverse members of the student body are reflected in allocation policies. The study has clearly identified this as an area where leadership could be shown.

- Encourage more equitable distribution of educational funding resources through minor eligibility amendments.
- And keep in mind that if you always do things the same way you will always get the same results!

Directions for Future Research:

There are areas of this study where I recognize that additional research would add to understanding issues I hoped to raise. These are: a gender analysis of data specifically aimed at examining adult women's access to scholarship provisions; an analysis of similar data to that collected at the case study university at other universities where "full-time" was differently defined or where different criteria were used, to identify if these changes resulted in increased access to awards by adult students; an analysis of the other financial aid provisions often made available to undergraduate students – bursaries, work-study opportunities, co-op placements, perhaps even on-campus work positions – aimed at discovering if eligibility criteria used in the allocation of these opportunities might also funnel provisions towards some groups of students and away from others; and a survey of a larger sample of universities to discover other differences and alternative approaches to scholarship allocation. All these areas of research have the potential to be within the reach of university administrators and researchers within a very few years when university computing systems will have the capability of easily generating all data required by such research.

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Appendix A

Questionnaire:

What are the general eligibility criteria (rather than specific eligibility criteria for individual awards) attached to renewable entrance scholarships and non-renewable entrance scholarships? For example:

- Do students have to be entering your university directly from high school?
- Do students have to be entering full-time study?
- Is there a limit on the number of years that can have passed between leaving high school and entering university to be eligible for an entrance award?
- Are renewable entrance scholarships available to students transferring from college?
- For students transferring from college: do students have to be full-time college students directly entering full-time university study?
- Are any classes of students ineligible for entrance awards (such as international students, mature students, part-time students, and transfer students)? If so, which classes of student are ineligible?
- Are applications required? If so for how many awards?
- Do recipients have to be nominated? If so, by whom? And how many entrance scholarships require nomination?
- Are there any other general eligibility criteria that apply to your entrance awards that I have not listed above?

What are the general eligibility criteria attached to in-course scholarships? For example:

- Are applications required?
- Do recipients need to be nominated? If so by whom? And how many in-course scholarships require nomination?
- What percentage of a full-time course load do students have to complete each year to be eligible for these awards?
- Can summer studies courses count towards course load requirements?
- Does the number of courses required to be eligible have to be completed between September and April?
- Are any classes of students ineligible for in-course scholarships (such as international students, mature students, part-time students, and transfer students)? If so, which classes of student are ineligible?
- Are there any other general eligibility criteria that apply to your university's in-course scholarships that I have not listed above?

What are the general eligibility criteria attached to part-time students scholarships? For example:

- Are they available to students entering university?

- How do you define part-time?
- What is the percentage of a full-time course load that a student must complete to be eligible for these awards?
- What is the upper course load limit (expressed as a percentage of FTE) and lower course load limit required to be eligible for these awards?
- What is the grade point average a student must achieve to be considered for these awards?
- Are recipients nominated for these awards? If so by whom?
- Do recipients need to make an application?
- Are there any other general eligibility criteria that to part-time students scholarships at your university that I have not listed above?

Can you explain how the general eligibility criteria you have noted in your responses came about?

In your opinion, would you say that adult students have equal access to university-administered undergraduate scholarships?

- If so, why?
- If not, how could access become more equitable?

Does your university prepare reports that track the age of recipients of undergraduate scholarships?

What are the total numbers and the total values of each of the following classes of undergraduate scholarships offered at your university each year:

- renewable entrance scholarships,
- non-renewable entrance scholarships,
- in-course scholarships,
- part-time students' scholarships?

Thank you for your assistance

Appendix B

Approved Ethical Consent Letter for Data Gathering:

Adult Students' Access to University-Administered Undergraduate Scholarships

You are being invited to participate in a study entitled Adult Students' Access to University-Administered Undergraduate Scholarships that I am conducting. My name is Cora Donegan-Smith and I am a graduate student in the Human and Social Development department at the University of Victoria and you may contact me if you have further questions by telephone at *** ** * or e-mail at ****@**** **.

As a graduate student, I am required to conduct research as part of the requirements for a master's degree in Studies in Policy and Practice. It is being conducted under the supervision of Dr. Pamela Moss. You may contact my supervisor by telephone at 250-721-6297 or by e-mail at pamelam@uvic.ca.

The purpose of this research project is to determine if adult undergraduate students (that is undergraduate students aged 25 years and above) are recipients of undergraduate scholarships in proportions that reflect their presence in the undergraduate population at four Canadian universities.

Research of this type is important because adult students' access to undergraduate scholarships is a topic that has not been researched in adult education literature.

You are being asked to participate in this study because: you are an administrator at one of the universities at which I should like to complete my study; you have detailed knowledge of the university policies that surround the allocation of undergraduate scholarships; and you have access to computer systems that can be used to gather anonymous data about undergraduate scholarships, the age of recipients of these awards, and the age of students showing the academic ability that might make them recipients of scholarship awards.

If you agree to voluntarily participate in this research, your participation will include completing an interview that will help me gain understanding of undergraduate scholarship policies and provisions at your university. This interview will take less than an hour to complete and will either be conducted in person by telephone. The interview will be audio-recorded or I shall take notes to help me remember details of your university's policies and information you have shared. It is not my intention at this time to quote participants directly in my study. However, if after reviewing the data I feel that quoting participants might add to my study, I shall contact you to request your permission to quote you and to verify that the quotes chosen are accurate. During the interview I should also like to discuss the anonymous quantitative data I should like to include in my study and I shall ask for your assistance in gathering this information. I should like to collect four sets of

anonymous data: one will show the ages and gender of full-time and part-time undergraduates by head count totals for the last academic years; the second will show the total number of undergraduate scholarships (and their values) awarded each year as entrance scholarships, in-course scholarship, and part-time student scholarships by your university; the third will indicate the age of recipients of undergraduate scholarships in each of these three classes by headcount totals only; and the last will show the age of those students who have achieved GPA's in the top ten percentile by headcount totals only for the last five years.

Participation in this study may cause some inconvenience to you, including the time it takes to complete the interview and the time it takes to gather the anonymous quantitative data.

There are no known or anticipated risks to you by participating in this research.

The potential benefits of your participation in this research include contributing to knowledge about adult students' access to undergraduate scholarship.

Your participation in this research must be completely voluntary. If you do decide to participate, you may withdraw at any time without any consequences or any explanation. If you do withdraw from the study your data will not be used in my study unless you agree to its use in writing.

Since the study will involve two research gathering activities (an interview and gathering of anonymous quantitative data) to verify that you continue to consent to participate in this research, I will remind you that your participation is voluntary on every occasion that we speak with each other about my research.

In terms of protecting your anonymity I shall not use the name of your university in my study, I will not use your name or indicate your position within the university in my study, and I shall not present any information in any way that might identify you or your place of employment.

In order to protect your confidentiality and the confidentiality of the data I will report the data as they relate to each university through the use of anonymous labels (university A, B, C, and D) and I will discuss my findings with my supervisory team by referring to each university only as university A, B C or D. I will be the only person who will listen to the tapes or read the field notes and I shall protect the confidentiality of information shared. I will store all data securely at my home in my desk and on my password protected computer.

Data from this study will be disposed of by erasing the tapes and shredding field notes and anonymous quantitative data at least two years after my thesis defence.

I shall send a summary of my findings to participants. It is anticipated that the results of this study will be shared with others only in my thesis defence and thesis.

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Participation in this study may cause some inconvenience to you, including the time it takes to complete the interview and the time it takes to gather the anonymous quantitative data.

There are no known or anticipated risks to you by participating in this research.

The potential benefits of your participation in this research include contributing to knowledge about adult students' access to undergraduate scholarship.

Your participation in this research must be completely voluntary. If you do decide to participate, you may withdraw at any time without any consequences or any explanation. If you do withdraw from the study your data will not be used in my study unless you agree to its use in writing.

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I shall send a summary of my findings to participants. It is anticipated that the results of this study will be shared with others only in my thesis defence and thesis.

In addition to being able to contact the researcher (and, if applicable, my supervisor) at the above phone numbers, you may verify the ethical approval of this study, or raise any concerns you might have, by contacting the Associate Vice-President, Research at the University of Victoria by telephone at: 250-472-4545.

Your signature below indicates that you understand the above conditions of participation in this study and that you have had the opportunity to have your questions answered by the researchers.

Name of Participant

Signature

Date

A copy of this consent will be left with you, and a copy will be taken by the researcher.

Appendix C

Approved Ethical Consent Letter for Survey:

Introduction:

My name is Cora Donegan-Smith and I am a graduate student in the Studies in Policy and Practice program at the University of Victoria.

As part of the requirements for my Master's degree in Human and Social Development I am conducting research that will examine adult students' (that is undergraduates aged 25 years and older) access to university-administered undergraduate scholarships at a number of Canadian universities.

I am writing to ask for your help gathering data to be used in my thesis research. Your assistance is completely voluntary.

If you volunteer to help I would like you to complete the short questionnaire that follows this explanation. I estimate that it might take about 15 minutes to complete.

Your responses will be treated anonymously. They will be used to quantify commonly used eligibility criteria that might limit adult students' access to undergraduate scholarships.

If you return the completed anonymous questionnaire to me by e-mail it will be understood that you have consented to the use of the information provided, in aggregate form, in my Master's thesis and in my thesis defence.

If you should like to receive a summary of my research findings please contact me. I have provided contact information at the end of this e-mail.

Thank you for any help you can provide to me: it is greatly appreciated.

Contact Information:

If you should like to contact me to discuss my study I can be reached by phone at *** **
**** of by e-mail at ****@*** **

This study is being conducted under the supervision of Dr. Pamela Moss and she can be reached by phone at 250-721-7067 or by e-mail at pamelam@uvic.ca

To verify the ethical approval of this study please contact the Associate Vice-President Research at the University of Victoria at 250-472-4545.