Commission for International Adult Education (CIAE) of the American Association for Adult and Continuing Education (AAACE)

Proceedings of the 2015 International Pre-Conference

November 15-17
Oklahoma City, Oklahoma

American Association for Adult and Continuing Education
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Commission for International
Adult Education
(CIAE)
of the
American Association for Adult and
Continuing Education
(AAACE)
64th Annual Conference

CIAE Mission Statement

The Commission on International Adult Education (CIAE) of the American Association for Adult and Continuing Education (AAACE) provides a forum for the discussion of international issues related to adult education in general, as well as adult education in various countries around the globe. The following purposes summarize the work of the Commission:

- To develop linkages with adult education associations in other countries
- To encourage exchanges between AAACE and associations from other countries
- To invite conference participation and presentations by interested adult educators around the world
- To discuss how adult educators from AAACE and other nations may cooperate on projects of mutual interest and benefit to those we serve

The Commission holds its annual meeting in conjunction with the AAACE conference.

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Message from AAACE President

Dear CIAE Pre-conference Attendees,

Welcome to the annual pre-conference of the AAACE Commission for International Adult Education! This is a special time to meet colleagues from across the globe and to develop relationships that will strengthen efforts to make a difference in the lives of adult learners. No matter where we live, we share that common commitment to creating a world in which lifelong learning ensures humane and just societies for everyone, and this pre-conference is an opportunity to come together to strengthen our voices and efforts to achieve that mission. The theme of the AAACE conference this year, ***"Evolutions and Revolutions in Adult Learning!"*** reflects the changes in life and learning you have seen over the years, as well as the changes you continue to create within your own countries and transnationally. Your AAACE colleagues look forward to developing international partnerships in order to learn how best to ensure every individual is able to create the lives they wish to live. On behalf of the AAAACE Board of Directors, I wish you meaningful and joyful interactions during your pre-conference and many long-lasting relationships around the world. Again, *welcome!*

Sincerely,

Jean E. Fleming, Ed.D., RN
President 2014-2015
AAACE

Commission for International Adult Education (CIAE) of the AAACE International Pre-Conference 2015

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TOOLS THAT MATTER: THE ASSESSMENT OF ONLINE RESOURCES FOR INTERNATIONAL STUDENTS

Valeriana Colón[1]

ABSTRACT: In the age of technology, educators are encouraged to incorporate online resources into their teaching, but the effectiveness of these resources on learning and the student perspective is rarely taken into consideration. A key aspect to the assessment of online resources for international students is the user's perspective. Culture has a significant impact on preferences towards tools, design aesthetics, and information provided online. This study begins with a review of theories and research on how students learn across oral, written and online modes of communication, creating a foundation for assessing online resources. After highlighting the similarities and differences across modalities, the study looks at current assessment methods as noted in scholarly literature. The study concludes by exploring student perceptions through a case study of three adult international students. With this information, educators are able to select and assess effective online resources for diverse groups. This is a very broad overview of theories and research. It is not intended to go into much depth on any particular aspect, but rather to encourage educators to reflect on their use of online resources.

Keywords: online resources, assessment, online learning, video tutorials, guides

Conceptualizing the Assessment of Online Resources

The advent of the internet quickly and dramatically expanded knowledge and its social nature, giving people the ability to take advantage of intellectual capital (Leu, Kinzer, Coiro & Cammack, 2004). Today there is an app for almost anything and online resources have made their way into the classroom. However, the assessment of these resources is often overlooked. A common practice in education is to consider a student's prior knowledge when teaching a concept; likewise, it is equally important to consider the needs of diverse students when selecting and assessing online resources. Without acknowledging the student perspective, educators miss a key aspect of their students' intellect, causing students to struggle to engage and maneuver through online information. In contrast, meaningfully connecting with information online promotes problem-solving and critical thinking, helping students become confident and responsible contributors of information (Detlor, Booker, Serenko, & Julien , 2012). In reviewing the evolution of communication across modalities, educators can build a foundation for understanding how to use and assess online resources effectively. As society has developed from oral traditions, to writing, to online media, the modes of communication have diversified how students engage in social learning and have broken down barriers, but what has not changed is what it takes to learn (Laurillard, 2002). Although various theories are presented in this study, educators are encouraged to reflect on their personal

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beliefs of how students learn across modalities and the needs of diverse groups to connect those concepts to assessment methods.

Life Before the Alphabet: Orality

Through oral traditions or orality, society first began to share information. Centered on events or interactions, the meaning of words in orality derives from the interplay between what is being said and its context (Goody & Watt, 1968). The interpretation of experiences is mostly in the moment, since revisiting information is highly dependent on one's ability to recall what was said. Learning stems from immersion in the words of others, repeating and mastering the oral discourse of a field in action (Ong, 1982). People use discourse to develop and present ideas persuasively and in a favorable style of speaking--while incorporating ideas of others and seeking connections between ideas. By actively participating in storytelling, people act out and identify with societal values and beliefs (Levi-Strauss, 1966). Information changes as new experiences challenge the assumptions used to interpret the original experience. Reflection is essential because it helps differentiate and integrate the context of interpretations to create greater meaning (Mezirow, 1991). Oral information changes through the process of forgetting, transmitting extraneous information, conveying information inconsistently or glossing over information from person to person (Goody & Watt, 1968). In orality society passes down information from one generation to another through memorized stories or accounts of events.

Immortalizing Words in Writing

The development of an alphabetic script was a technological advancement, which decreased the dependence on memory to transmit and retain information (Levi-Strauss, 1966). Although the written word loses the sensory impact of a person-to-person emotional connection as it shifts to a person-to-written representation of a person's words, writing enhanced orality by providing a means to organize concepts (Ong, 1982). Since writing is a slower process than speaking, it enables the written word to be less fragmented (Chafe, 1982). People are able to explore ideas and events through classifying, sequential ordering, and explaining with greater ease (Ong, 1982). This process leads to corrections and resolutions of inconsistencies. In capturing spoken words, writing is a key factor in enabling society to transmit thought and culture over time and place (Good, 1977). The evaluation of texts, in addition to oral discourse, brings light to varying ideas, values and beliefs.

Going Online

As the development of writing was a technological advancement on orality, online technology advanced both the spoken and written word. The meaning of online information still derives from the interplay between what is being said [online] and its context. Knowledge is experienced with the spoken and written word through the use of a computer and it is still socialized. Speaking, reading, writing, and virtual play is used to act out and identify with societal values and beliefs. Again, there is a loss of interpersonal connection as communication shifts to person-to-digitized representations. The internet creates an environment conducive to the exchange of life experiences and different points of views (Coiro, 2009). The exchange, like in all modalities, transforms old ideas and builds new ones through contemplation and reflection. Online repositories store information throughout time, place and now space as knowledge is taken out of the physical world and placed online, further extending its shelf life and arguably its accessibility. Purposefully engaging in problem solving online requires one to know what to pay attention to and what to ignore, especially with features that attempt to capture one's attention (Lankshear & Knobel, 2001). The complex online environment requires regulator strategies to skillfully transition between rapid reading, searching, and the in-depth construction of meaning (Coiro & Dobler, 2007). Online resources and applications help record, store, and share information.

Assessment of Online Resources

Interaction with others is essential in all modalities for critical thinking, connecting knowledge to practice, problem solving, and innovative thinking. Without this foundation, the acquisition of information becomes, "a form of consumption without the production of deep knowledge and the development of skills important for the future" (Gee, 2012, p. 419). The modes of communication are conducive to learning when they present content in a meaningful way, encourage students to think and create, give students the freedom to make choices on how to interact in the environment, and are collaborative and social (Gee, 2012). As modalities are embedded in society, exercising these modalities differs across cultures. Meaning, the way in which one speaks, writes, or functions online, differs across countries, generations, status, etc. This difference in meaning is especially important to remember when selecting and assessing online resources for diverse groups.

In beginning any assessment process, it is important to remember the purpose of assessment is to improve student outcomes. What it means to have an understanding of a particular subject differs across subjects, departments, institutions, countries, etc. Assessment practices should be situated in culturally and institutionally supported description of what it means to have an understanding of the particular subject. A review of assessment literature in two relating fields, online courses and electronic platforms, identified (a) relevance to students' needs, (b) connection to academic concepts, (c) freedom and self-directedness, (d) organization, (e) collaboration, (f) accuracy and creditability, and (g) cost effectiveness, as key areas of assessment. Incorporating principles of assessment into educational practice can lead to the meaningful selection of resources, improved use, and enhanced learning.

Student Needs and Perceptions

The online world adds another dimension to a student's environment and communications with others. In the online environment, students learn from interacting with and using programed instructional systems, which require the learner's needs to be anticipated and addressed in advance (Govindasamy, 2001). This makes monitoring students' interaction and use of programed instructional systems essential in the assessment of online resources (Gonzalez & Westbrock, 2010). To gain a better understanding about how learners are using online resources, Welch (2007) suggests reviewing webserver logs to measure reference-generated visits. After tracking the use of their online resource, Courtois, Higgins, and Kapur (2005) looked at student perceptions and success by constructing a single-question survey that asked if students found the resource helpful. Laurillard (2009) emphasizes the importance of considering why the learner should participate and creating a series of activities that keep learners engaged. To discover the needs of learners Grays, Del Bosque, and Costello (2008) used virtual focus groups to assess the value of their online resource. Student needs and perceptions can be assessed through web logs, single-question surveys and focus groups.

Academic Concepts

Online resources are most effective in connection with academic concepts, with clearly stated objectives and features that guide learners through the lesson (Dewald, 1999). Since the online environment is the mode in which students are engaging in learning, it is important to incorporate learning theory within the programed instructional system. A study by Rebb and Gibbons (2004) stipulate that if online resources were more experiential, learners would find them more beneficial, understand the context of the information, and connect with broader concepts. The methods of assessing learning theory and bridging to academic concepts online are as varied as assessing teaching in traditional classrooms. Machine evaluations, such as multiple-choice test and simulations can be effective assessment methods (Ehlers, 2013). Ehlers (2013) states that comments posted by students and product-based assessments can be used to examine student work created with the aid of an online resource. It is also useful to review the technology affordances, which McCracken, Cho, Sharif, Wilson, and Miller (2012) define as, "mapping technology to the kinds of interactions that lead to learning" (p. 108). To examine the academic concepts presented in online resources one can review technology affordances, multiple-choice tests, simulations, comments, and product-based assessments.

Self-Directedness and Prior Knowledge

The amount of information available online requires learners to cultivate self-directedness. Resources should guide students through the learning process by helping them establish connections between repositories of knowledge and academic concepts. Laurillard (1996) stipulates that the access rates of online resources should be tracked and the information used to motivate learners. Sun and Rueda (2012) investigated the impact of computer self-efficacy and self-regulation in student engagement in distance education by surveying students using a questionnaire adapted from the Motivated Strategies for Learning Questionnaire; Situational Interest Scale; and Web Users Self-Efficacy Scale. The results indicated interest and self-regulation positively correlated with all types of engagement. With sufficient self-directedness and motivation, learners can often compensate for a lack of prior knowledge. Coiro and Dobler (2007) argue that with access to information, individuals with high levels of online reading skills may compensate for low levels of prior knowledge. The varying levels of prior knowledge and skills of learners should be taken into consideration when using online resources. Lessons should begin with self-assessments to see if students have already learned the concepts being presented; self-assessments also help students recognize key concepts and the material's organization (Ehlers, 2013). The online resources' capacity to cultivate self-directedness and prior knowledge can be judged using access rates, surveys and self-assessments, like quizzes and check-off lists. Self-assessments come in many forms and include brief quizzes and short check-off lists.

Organization

Since an abundance of information is stored on multiple platforms, it can be difficult for students to navigate resources and differentiate from academically irrelevant resources. Educators can fall prey to presenting an overwhelming amount of information or presenting a moderate amount of information in a disorienting way. Ehlers (2013) suggests resources that are simple, use intuitive navigation and aid in processing information. The organization should be regularly reviewed for relevance, ease of use, and format consistency. A learner's time should be focused on critical reflection, not spent lost in resources. Jackson and Pellack (2004) developed a self-assessment survey for institutions to assess their online resources. Hosie, Schibeci and Backhaus (2005) created a checklist to assess the quality of learning materials, by reviewing: accessibility, currency, richness, purpose, and inclusivity. Bowles-Terry, Hensley, and Hinchliffe (2010) developed best practices for creating video tutorials, by looking at speaking pace, video length, content, aesthetic, findability, and student interest. The organization of online resources can be evaluated through surveys and checklists.

Collaboration

Novice and experts alike interact with, contribute and alter information online. These interactions and contributions are critical to helping learners understand concepts through connectivity with others. Online resources can be enhanced by using various online collaboration applications to give learners the opportunity to engage the resource's author, other novices and experts in discourse on concepts. Through discourse, information and academic concepts are transformed and learners learn. Ehlers (2013) believes that good online resources offer multiple opportunities to connect students with their teacher, peers, and other experts. This fosters a community of practice and communicative learning principles, while challenging learners to investigate the accuracy and credibility of sources. The design of online resources should be conducive to collaboration in a natural and authentic way. Collaboration can be gauged through monitoring comments, emails, or other student contributions.

Accuracy, Credibility and Cost

Since both information and the online environment changes regularly, it is necessary to ensure online resources are accurate and creditable. Anyone can place information online without formal review, making it essential to examine the claims and assumptions presented in resources. Morain and Swarts (2012) developed several rubrics to access various aspects of video tutorials to include the video's accuracy, completeness, and pertinence; and the author's confidence, self-efficacy, and engagement. Hosie, Schibeci and Bachaus (2005) created a checklist to review the reliability of the interface, learning goals, directions, communication, bandwidth, accessibility, and style of the resource. As technologies are ever changing, it is important to analyze the costs of resources to the potential impact on student outcomes. Dobbs and Sittler (2013) evaluated the economic value of online resources with a rubric that looked at the cost per use, goals, usage, visits; and subscription traffic. A resources' accuracy and cost-benefit can be calculated using rubrics and checklists.

Implementation

With so many methods of assessing various elements of online resources, it may be difficult to design an appropriate approach. The time dedicated to assessment should be proportionate to the intended use. A two-minute video should not be assessed to the same extent as a costly district-wide resource. First, it must be reiterated that the purpose for assessment is to improve student outcomes. Next, it is important to consider a culturally and institutionally supported description of assessment elements. Then, educators should briefly check through the elements that the resource addresses. This article highlights relevance to students' needs, connection to academic concepts, design suited for self-directedness, organization, collaboration, accuracy, and cost effectiveness. An online resource does not need to cover all of these elements to be considered a "good resource." Unless the teaching is taking place completely online, these resources are imbedded in instruction. Any element that is missing can be incorporated into the overall lesson. However, if the online resource is not substantively contributing to the intended task, its use should be reconsidered. Lastly, depending on the resource's use, complexity, and cost, educators should look at each or a selection of the assessment elements in greater depth, using a coordinating assessment method. It is essential that educators take the time to assess online resources, making implicit considerations explicit.

International Student Perceptions of Online Resources

Online behavior is a cultural expression of a community's shared values (Chau, Cole, Massey, Montoya-Weiss, & O'Keefe, 2002). For international students, this means that their authentic online behavior may be significantly different from the perspective presented in a US classroom. The dominant culture of the class can disrupt student learning by cutting students off from a valuable source of information- their culture. To maintain student-centered practices, educators need to keep the student perspective in mind (Rogers, 1969); this matter most closely relates the assessment element, s*tudent needs and perceptions*. When multiculturalism is promoted in education, diversity becomes a resource not a disadvantage (Waters, 2001).

Conceptual Framework

With little research published on student perceptions of online resources, literature on customer perceptions of websites in the international business was reviewed. Chau, Cole, Massey, Montoya-Weiss, and O'Keefe (2002) defined culture as a collective phenomenon of the shared values of a community in their study on consumer online behaviors. Jin (2010) contends that culture is a determining factor in the websites people find attractive. Seidenspinner and Theuner (2007) believe that culture determines preferences towards navigational tools, design aesthetics, and information provided. Mazaheri, Richard, and Laroche (2011) connect emotions to perceptions. Emotions lead to the perception of the degree to which the site is considered informative, effective and entertaining. This transition from emotions to perception then influences one's attitudes and involvement.

In the conceptual framework of this study, culture (values and beliefs) shapes perceptions (how one interprets experience), which then informs preferences. The following are some useful definitions for the framework:

- Perceptions: an interpretation of the experience
- Culture: values and beliefs that distinguishes one group of people from another (including- gender, race, socio-economic status)
- Values: characteristics that are identified as important
- Beliefs: general assumptions or ideas held to be true
- Preferences: a demonstration of like or dislike for one characteristic over another

Research Questions

(1) How do international students use online resources for academic purposes?
(2) What process do international students use to select online resources?
(3) What qualities do international students value?
(4) What types of resources do international students prefer?

These questions address the study's goals by providing insights needed to guide the selection of meaningful online resources and provide a basis of assessment.

Data Collection

This study used interviews and a document analysis in a five-part data collection process. The students:

(1) were given an overview of the research project and signed informed consent,

(2) had up to thirty minutes to explore the mock research question online while their actions were recorded,

(3) were interviewed for fifteen minutes about the steps they took to answer the research question,

(4) responded to some general questions about their online activity, and

(5) were thanked for their participation and asked to be available in the future for follow up questions.

The mock research question, "Is wind energy cheap? Is it effective? Is it practical?" was constructed by considering the students' language level and vocabulary. The question was out of the students' area of expertise to encourage the need to research the answer.

Participant Selection and Site

Students were selected to participate in this study based on their country of origin and language proficiency. Since the study explores international student perceptions of online resources, it was imperative to select participants from diverse backgrounds. However, without interpreters and translated materials, the students had to have advanced language proficiency to communicate with the researcher and actively participate in the study. For this reason, all three participants were selected from a list of former students of a small language program associated with a liberal arts college. Student identities were kept confidential and pseudonyms were used. Han is a twenty-year-old, Korean student. He received his high school diploma in his home country before coming to the US a year ago. Mo is twenty-seven years old, Saudi Arabian student. He received a bachelor's degree in his home country before coming to the US a year ago. Charlie, a nineteen-year-old Taiwanese student, received his high school diploma before coming to the US nine months ago.

The location of the data collection, a small conference room at a local coffee shop, was selected based on the accessibility and familiarity to the participants. The conference room was formal enough to provide a structured setting, but casual enough to not impede responses. The interviews were not conducted in a classroom, since the halls of the school are very busy and the presence of their peers might have affected their responses. The location also provided Wi-Fi access and power outlets, which was essential for the study.

Data Analysis

After completing the fieldwork, the data were analyzed with the aid of Atlas.ti. The analysis began with a review of the students' answers to the mock research question. Next, a document analysis was conducted on each student's recorded online activities. The document analysis was compared to the students' interview responses for agreement, using both a deductive and inductive coding approach. Various codes were assigned to highlight distinct commonalities and differences amongst the students and between the interviews and the online recordings. Responses were coded that appeared to be culturally significant and provided insights into the formation of student perceptions. This form of data analysis was selected because it allows for a synthesis of multiple responses and captures various points of view.

Results

During the interviews, the students indicated they move between English and native language resources when using the internet for academic purpose. However, each student transitions between languages a bit differently. Charlie says that he searches in English, "because the question comes from English not from my language". Then he switches to Mandarin, "if I cannot find the things I want, I cannot read or I don't want to read". Han says that he prefers starting with Korean resources. He reasons, "Korean is my native language, so I can understand easier than English, but sometimes it's the same, even if I cannot understand Korean I can use English". Han uses English resources as a backup, when Korean sites fall short of providing him with the information he needs. Overall, a transition in language is initiated when the student hits a wall and feels another language can provide additional information.

Although all of the students mentioned in their interviews that they use native language resources while conducting research, none of the students used them in their recorded search for this study. This finding was interesting and could have many possible causes. When Charlie was asked why he does not use a translator during his university science class, he said that it would not be fair since the other [native English speaking] students could not use translators. He went on by saying, "I finish my English program, I should know things and I don't… I feel like I'm the only one, it's only me." For Charlie, there seems to be a certain level of shame associated with openly using native language resources for academic purposes and he may not want to stand out amongst his peers as different.

The process that the students use to select online resources centers mostly on information provided by others rather than internal criteria. All three students used search terms that came directly from the mock research question. Mo reasoned, "Because it was the first title, first part of the question". Charlie and Mo used Google's auto complete by typing in the first word on the mock research question then accepting Google's suggestion to complete the search phrase. Once the information query was complete, Charlie and Mo selected the first site listed by Google. Han, on the other hand, read the site descriptions to make his selection, and chose the fifth resource. He stated, "I was looking for like a sentence about my thesis statement, some sort of I thing like a sentence and also what is the reason in the research paper and then what information I want to take from this paper". Charlie and Mo seem to trust the information presented by Google with little critical scrutiny, while Han is more selective and considers the relationship between the search term and the purpose of the research.

Popularity seems to be a quality that the students value. All three students used Google in their recorded search and stated it was their preference. Mo mentioned that he uses Google because it is the most popular site in the US and easy to use. Charlie said he prefers Google, but also uses Yahoo to search in Mandarin. He deemed Yahoo a better search engine because "it is more popular in Taiwan and yielded better results". Lastly, Han said he uses www.naver.com, a popular search engine in South Korea. The students expressed a connection between popularity and the quality of information (if many people use it, it must be good).

The students had varying ideas about the characteristics of resources that they liked or disliked. "If there is too much information at the same time," Han finds the resource repelling. Charlie does not like resources that make it difficult to find information or read. He determines the quality of a resource by comments made by other people, "if somebody writes a comment right and maybe like the comment shows some of the same problems the article have or like this article has some part is like error". He goes on to say he dislikes resources that are political, while Mo dislikes advertisements. Overall, the students seem to like or dislike a resource by how the information is presented (quantity and organization) and the content (advertisements and politics).

Limitations

During the study the following threats to validity were considered:

- Is there another basis for the student's perceptions that has not been identified?
- Have the student's perceptions been misidentified?
- Can the student's clearly articulate their perceptions?
- Do the interview questions target the student's perceptions?
- Does the researcher's bias lead to a misinterpretation of the student's perceptions?
- Does the researcher's presence cause the student's to alter their responses?

These questions are threats to validity because they highlight possible misinterpretation of the data, drawing incorrect conclusions, or not being able to draw conclusions at all. In order to guard against these threats the study was designed to use various activities to investigate the same questions. This confirms the information collected and highlights relationships. During the study, the students were asked to share any additional information that came to their minds, allowing students to consider and include aspects not explicitly asked in the study. Each response was rephrased and repeated back to the student to provide an opportunity to confirm the interpretation of the information provided. The use of computer-recorded actions allowed students to review their steps and reflect on their actions after completing them. These computer-recorded actions lessen the student's dependency on memory and were used as a basis of comparison. An outside advisor monitored this process and provided continual feedback.

Although the results of this study can inform the selection of online resources for the participants, the information should be generalized cautiously. While generalization can be made about various cultures, culture is unique to each individual. The values and beliefs of one person from a particular cultural group may not be representative of the entire group. The participants in this study have been in the US for nine months to a year, which could have impacted the cultural practices of the students. Furthermore, culture and the online environment are dynamic and change over time. The results of this study are emblematic of the moment in time in which the study took place and caution should be taken when generalizing the results to future dynamics.

Conclusions

The international students in this study indicated that they move between native language and English resources. Being able to transition between languages to find additional information can be a significant advantage for international students, adding richness to the student's research. Trusting Google, selecting the first site listed, and favoring popular resources is not unique to international students. According to an American Library Association report (1989), students across the nation need to learn the skills needed to locate, evaluate and effectively use information resources. However, international students may be more sensitive to the quantity and organization of information in resources. In order for diverse students to engage in the critical exploration of academic knowledge, educators need to consider whose narrative or version of the truth is being taught and how the student will relate to this information (Phan & Baurain, 2011). It is important to understand each student's educational history and create assignments that give students the ability to draw on their prior knowledge to reduce information overload (Miller & Endo, 2004). To create a nurturing and conducive learning environment, educators need to consider the assumptions they make regarding student online behaviors and honor the student's culture and preferences.

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FACULTY DEVELOPMENT AND TEACHING INTERNATIONAL STUDENTS: A CROSS-NATIONAL STUDY OF FACULTY PERSPECTIVES IN A GLOBAL ERA

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ABSTRACT: This paper describes a component of a larger cross-national comparative study on faculty development for teaching international students. Here we describe the study and report preliminary findings that offer analyses of the informal and formal means by which Italian and US university instructors enhance the knowledge and skills they find necessary to teach international students successfully in this era of educational globalization. We also offer insights and challenges of conducting cross-national adult educational research and explain why such studies across international adult and higher education contexts are essential in understanding how the world of academe is learning to adapt to globalization and international student mobility.

Keywords: faculty professional development; teaching of international student populations; cross-national adult education research

Brief Literature Review

In the current era of higher education, universities are focusing on internationalization of their campuses and educative experiences. For example, the European Union posited that internationalization "must move into the very centre of the university or college strategy and development" (2013, p. 50). Correspondingly, with the trend of international student mobility increasing worldwide, international students are expected to enroll in institutions of higher education at record rates (European Union, 2013; Hudzik & Briggs, 2012). These increases now require instructors of adult and higher education (AHE) to consider their work in ways that may transcend their own cultural influences (Coryell, 2013). This change is required not only because of the diversity of their learners but also because knowledge is transformed through global intersections of society, the workplace, politics, economics, and lifelong learning (Altbach & Knight, 2006). While we know that international graduate students come to universities with different ethnic, cultural, linguistic, political, and religious backgrounds, this diversity in the student population poses benefits and challenges for instruction as faculty seek to provide meaningful and effective teaching for internationally diverse student populations (Trice, 2003). As such, Green (2007) suggests teaching in a global era must focus on student learning in a manner that draws knowledge from diverse situations, cultures, and languages, while using integrative skills in problem-solving and decision making, and identifying the

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cultural influences that shape our lives.

We understand that professional development involves a professional and the development of that professional--with development defined as "the continual deepening of knowledge and skills" (Pate & Thompson, 2003, p. 126). We also know that faculty professional development can happen through a variety of formal and informal ways (Garet, Porter, Desimone, Birman, & Yoon, 2001). Nathan (1994) posited that faculty development can no longer be optional or superfluous for institutions of higher education. Of late, a shift in professional development for university faculty has moved away from a focus on teaching to centering on facilitating student learning through social constructivism (Lieberman, 2005). Faculty development is now concentrated on the "process of enculturation into a community of practice by means of social interaction among learners and between learners and teachers" (Tiberius, 2002, p. 30). While the literature on the experiences international students face on campus is increasing, unfortunately, scant research has been dedicated in the field of AHE to investigate how professional development can occur for instructors of international students (Stevens, Emil, & Yamashita, 2010; Tran, 2013; Trice, 2007). And, now with the increase of international student enrollments, extension and expansion of knowledge and skills for instructors must be an integral element of both the faculty development and international education movements.

Our cross-national team thought to address this gap in the research by employing a comparative study across international AHE contexts to investigate how faculty worldwide are learning to adapt to globalization, international student mobility, and appropriate instructional practices. The study was designed to examine experiences of faculty development regarding the motivations, preparations, challenges, and personal learning AHE instructors in the US and Europe have when teaching international students. We aimed to ascertain the ways in which university faculty individually and collaboratively go about their own intellectual, affective, and professional development in order to facilitate learning with diverse international student populations. Additionally, as an international comparative study, it was designed to provide context and insight to inform the future of faculty professional development that can transcend national borders. As such, we employed a broad definition of faculty development to include the (non)formal and informal means by which faculty members enhance their knowledge and skills through research, teaching, personal wellbeing and growth, and the management of one's career (Mathis, 1982; Schuster, Wheeler, & Associates, 1990).

Our research team included professors and research assistants in adult education from the Università degli Studi di Padova (University of Padua, UoP), Italy, and Texas State University (TXST), USA. Monica (UoP) and Joellen (TXST) have conducted research and published together over the last two years, and an MOU between our universities was signed in spring of 2015. Our MOU establishes future collaborations in research and teaching. The earlier research collaborations were essential in setting up the processes and procedures of the current cross-national research project. Here, we offer an overview of the study with preliminary findings. We then conclude the paper with reflections on the complexities and benefits of conducting research in multiple international locations and collaborating across academic cultures, long distances, and time zones.

Methodology

Theoretical Framework

This research was framed by situated cognition, and more specifically, viewed through the lens of communities of practice. Situated cognition considers the context and influences inherent in the educational environment. Central to the theory are *communities of practice* which Lave and Wenger (1991) refer to as "a set of relations among person, activity, and world, over time and in relation with other tangential and overlapping communities of practice" (p. 98). Within this framework, learning and professional development is viewed as a function of the context, actions, behaviors, and culture in which they occur. In the educational context, the community of practice consists of instructors, other experts, students, learning resources, and other influences that all bear on the learning and engagement of the participants. Development within this framework is not located exclusively within the individual; instead, it is situated communally and involves the differences of perspective among co-participants (Hanks, 1991). Learners, in this specific case, faculty, therefore, are considered members of a community of professional practice which represents attitudes, behaviors, and values to be attained.

Research Design and Research Questions

University instructors participate within a variety of communities of practice that may (or may not) help them to prepare to teach students from another culture and country. Johnson and Golombek (2002, p. 1) assert that what instructors understand about teaching is "largely socially constructed out of the experiences and classrooms from which [they] have come," and therefore recommend conducting qualitative research eliciting professional and personal stories in understanding instructor professional development. Therefore, a qualitative interpretivist research methodology was employed in the current study. The lived experiences of university instructors who teach and mentor international graduate students provide meaningful insight into the complexity, benefits, challenges, and perspectives of what it means to teach in this global era. As such, this study explored faculty members' lived experiences to answer the following research questions:

1) What personal and professional learning may faculty have gained as a result of teaching/mentoring international students? And,
2) How might these experiences inform future faculty development in the current era of university internationalization?

Contexts and Participants

Purposeful sampling, a non-randomized procedure used to recruit informants who are reflective and observant members of a community of practice, are knowledgeable about the community culture, and can share their stories and insights, was utilized (Patton, 2002). Professional development trainings on teaching/learning strategies for the global era were offered across three universities in the US and Italy. These universities were data collection sites. Instructors who attended the workshops were contacted for possible participation in the study. The research team believed that faculty members who have volunteered to attend professional development on university internationalization and instruction were likely to have a unique set of experiences and understandings regarding teaching and learning with both international perspectives and international students – making them ideal participants for the current study. Inclusion criteria included individuals who have taught/mentored international students at their respective universities, attended an above mentioned training seminar/workshop, were employed by their university with full-time teaching status, and had teaching experience of one year or more. Recruitment procedures began after TXST IRB approval with email messages to workshop participants to explain the study and request volunteers.

A total of eighteen professors, 11 from Italy and seven from the United States, participated in the study. Italian professors, seven females and four males, were all Italian and are fulltime instructors at one of two different universities in Italy. U.S. professors, six females and one male, are from the U.S. with the exception of one professor who is originally from Mexico; these professors currently teach at one university in Texas. The average university experience for the Italian professors was 14.2 years with the most university experience by one professor being 28 years, and the least experience being three years. Professors from the U.S. averaged 17.7 years of university experience with the most experience being 25 years and the least being 9 years. Overall, the average university experience of all participants was 15.5 years. All but one of the participants, a Spanish language professor from the U.S., reported currently teaching in English. The U.S. Spanish language professor predominantly teaches in Spanish as well as English whereas all of the Italian participants currently teach in their non-native language of English. One other U.S. professor currently teaches in English but has taught in Arabic while living and teaching outside the U.S. The remaining five U.S. professors currently teach in their native language of English and have not taught in a different country or in a different language. All of the participants' interaction with international students has been in English.

All Italian professors earned a Ph.D. with the exception of one professor who holds a DVM. Four U.S. professors earned a Ph.D., one has earned an MFA, one has earned two master's degrees, and one is currently in progress of obtaining her Ph.D. The departments that are represented in this study are: psychology, computer science, civil engineering, communication, business administration, law, business management, statistics, veterinary medicine, honors, geography, English, mathematics, modern languages and history.

Data Gathering

Volunteers were asked to participate in semi-structured interviews. During spring and summer 2015, participants were asked to recall experiences of when they had engaged in a) previous professional development (formal or informal) regarding learning about and preparing to teach international students, and b) actual experiences in teaching and mentoring international students in their programs. The semi-structured interview protocol was adapted from research on faculty development in international programs (Coryell, Alston, & Nguyen, 2012) and Trice's (2007) study on faculty perceptions of working with international students. Interview questions were developed to elicit narratives about participant experiences and how these experiences may have influenced their current approaches/methods, understandings, beliefs, values, insights, and perspectives about teaching international graduate students. These interviews were conducted primarily in English (as the language of instruction in all of the professional development trainings was in English), while the Italian members of the research team provided clarification in Italian when necessary. Each interview lasted approximately one hour and was audio/video recorded.

Data Analysis

Each interview was transcribed and kept confidential in a secure location in digital storage. We first listened to each of the interviews repeatedly to get an overall sense of the data. We created an analysis table template that provided a space to note responses to specific interview questions per interviewee. In this table we recorded their individual data as well as analysis observations. Next, we identified sensitizing concepts, "important features of social interaction" (Bowen, 2006, p. 3) and analyzed them for important features of the participants' experiences. Then, constant comparison (Glaser & Strauss, 1967) was employed to identify common codes and ultimately themes across the data set.

Preliminary Comparative Findings

Findings indicate that international students are enrolling in many disciplines and courses across the academy in both the U.S. and in Italy. Participating professors in this study do not teach or work in an international studies department, study abroad, or any other specific entity of the university that may traditionally facilitate learning for international students. Across the universities, professors were teaching international students in their respective fields of study where both international and non-international students attended the same classes together.

All but one participant speak or have some knowledge of more than one language, while 10 of the 18 reported knowing more than two languages. The languages that participants reported knowing were Italian, English, Spanish, German, French, Indonesian, Russian, Portuguese, Arabic, and Latin. Additionally, all of the professors in this study reported that they sought out personal and professional experiences with foreign travel suggesting they are interested in cultural and language learning. They all also specified their continued interest in teaching international students.

"What I Did, I Did Myself – Because I Wanted to Know": Professional Faculty Development for Teaching International Students

Across the data set, the participant professors overwhelmingly indicated a personal sense of responsibility to improve their teaching with international students. While some of the ways in which they augmented their knowledge and skills included non-formal learning (mostly in workshops and seminars), the majority of the methods of learning were informal and completed on their own time and often through personal finances. We also found that both the Italian and American participants genuinely desired to be effective teachers – for both international and domestic students. However, by examining the

content areas in which these professors explored in their professional development endeavors, we discovered that the focus was somewhat different in Italy than it was in the U.S. The most common professional development that our Italian participants identified having completed was for English language acquisition. In comparison, the most common professional development topic for U.S. professors was on internationalizing their teaching and curricula. Here we provided a thematic overview of the nonformal and informal professional development undertaken by our respondents by each country.
In Italian universities, many of the Italian professors either chose or were directed by their department administrators to teach courses in English. This is an important skill to possess in the Italian academy as a trend in Italian universities is to offer degree programs fully in English in order to attract international student populations and offer Italian students an opportunity to earn their degrees in a global *lingua franca*. All of the Italian participants were currently teaching courses in English, and they assumed personal responsibility and accountability to become proficient in the language of instruction in order to teach effectively. Therefore, in regards to professional development, our Italian participants sought additional formal English language training at their home university, at language institutes in England, and/or in private English tutoring on a weekly basis. For example, one indicated she attended a "seminar for teachers at universities...teaching us about English medium instruction," which sometimes included "some interactive [teaching strategies]." Others enrolled in summer intensive English language institutes. One participant explained,

> Last year, [while] planning to start this international adventure in my university, I went to Oxford for 15 days, yes 2 weeks, and I started to study very hard English. And then after that, I'm taking private lessons of English here in Padova and still now I'm doing that. I'm leaving to Oxford next month, this summer, and then I want to continue to improve my English.

Another clarified her desire "to improve my fluency, my vocabulary… my formal [English teaching abilities]." A strong focus on professional development for these instructors is learning how to communicate in English and facilitate engagement in the learning process in a language which is not their mother tongue.

Informal learning, however, also comprised much of the professional development in which our Italian respondents engaged when preparing to teach international students. These professors described searching for and studying internet resources, learning from international colleagues, and reflecting on their own experiences abroad. Some sought online syllabi from foreign universities to compare and augment content with their own curriculum, while others found "lectures of academic English," or attended to "how others teach…to see some [lectures on] YouTube video or TedTalk video," or watched videos from the World Bank to obtain ideas and tools they felt were useful in their teaching. In additional to utilizing other external instructors' and institutions' resources, Italian professors also identified reflecting on previous study and international study abroad experiences as particularly useful in developing understandings and skills to be used in the internationally diverse classroom. Some suggested that they considered previous professors' teaching practices. One offered, "I think about the best professors that I had, and I tried to recall the way in which they stimulated my interest, or they run a class, so I try to refer to that." Many also had engaged in exchange programs in which,

themselves, were international students. These experiences helped them to consider the academic and emotional interactions they had had while abroad, and their subsequent reflections upon these times shaped their approaches to international students in their classes. They also suggested that through conversations, advising, and mentoring international students, they continue to learn about cultural diversity and the needs of foreign learners. Correspondingly, some posited through observing and learning from international colleagues," "talking to them and discussing with them openly" about their teaching styles, and "compar[ing] different teaching styles," they had at times learned to "steal" different teaching methods and communication techniques. Respondents also acknowledged, however, that "each of us has a specific personality, so you have to adapt the suggestions on your personality, on your topic."
In comparison, participants from the U.S. teach predominantly in English, their own mother tongue, with the exception of one professor who teaches in her heritage language of Spanish. Therefore, the focus of professional development was appreciably different for U.S. professors. The American instructors in this study primarily reported attending nonformal professional development workshops on globalization and internationalization of curricula, diversity training, or learning communities for globalization. All of the U.S. participants in this study had completed a workshop on globalization. Most recalled the workshop as helpful in "infusing the global" into one or more courses. Another suggested the workshop was "exposure to things many of which were simply asking the right questions about the material you were dealing with so that it was open to different perspectives that come from abroad." Along with the workshop, participants have also engaged in additional seminars on "cultural diversity" and training to teach English as a second language.

However, informal professional development was cited much more extensively than (non)formal training experiences for this group of participants. Similarly to the Italian respondents. American participants posited their previous foreign travel, teaching abroad ("in the "Fulbright Hays program") and in other foreign teaching experiences, living abroad, and interacting with and learning from international colleagues have been very important learning opportunities for these professors. Many mentioned that interacting with and teaching international students in the past few years has also been very instructive. One provided an example of how much she has learned through discussions with foreign students; she explained, "Conversations that I've had with a student who is from Guanajuato…just about what it's like for her family now. Just always trying to keep learning and asking questions. Hear[ing] it, listening to stories people have is helping." Others suggested that "you have to do a lot of reading" in order to learn more about international perspectives and diverse cultures. While the U.S. participants did not report using the internet as often as the Italian participants, instead, many of the American instructors sought books on various cultural viewpoints with regard to their subject matter in the hopes of learning more about "the history and politics" of certain countries from which international students hail, and of which the course content covered. Finally, corresponding with many of the Italian participants, some instructors in the U.S. indicated "being an international student, myself, was critically informative." Reflection on their own experiences studying abroad provided insight helpful in relating with and teaching international students in their classes.

Professors from Italy are more responsible for ensuring that they teach effectively in English, whereas U.S. professors concentrated more on international curriculum development and understanding different cultural perspectives. The motivations for professional development for Italian professors were to enhance teaching methods primarily through developing fluency in English. For U.S. professors, instructional development was to create conscious awareness around globalization and ultimately internationalization of their courses.

Perspectives on Future Professional Faculty Development Needs

Data analysis suggested that the need for professional development specifically geared toward teaching in internationally diverse educational settings was universal across the participant sets. Professors in this study widely believed that university instructors would need to "invest in their own international development." Respondents advanced that further training in "diversity," "how to mediate cultural differences…and how to interact," and infusion of international perspectives "specific to the subject that you teach" are fundamental to future faculty development needs. Moreover, the Italian professors continued to stress the importance of developing "a set of tools, to have a set of best practices" for teaching internationally diverse students that would include developing culturally sensitive "soft skills" and learning "how to teach in a foreign language." Others were interested in pushing for better textbooks and learning resources that will help professors and universities to educate in this era of globalization. One Italian suggested,

> I think that the books are not ready [for] this internationalization. I'm trying to find out books that allow me to show videos, movies, interactive exercises…but they are not free [and I cannot easily] see and check and decide if these books are suitable for my course.

Primarily, the analysis across the data suggested the need for development in cross-cultural communication, teaching methodologies, and language skills. An Italian professor proposed,

> I think it's fundamental [to learn] how to interact with [different cultures]. You know, Anglo Saxon protestant type of people for us in southern Europe – it's an issue you know that most people don't realize. It's an issue. But I think there is much to be learned, and we end up dealing with these different cultures very often. And you know, likewise, meeting with people from the Far East, you know Southeast Asia, Japan. I think it would be very important for teachers that teach to these peoples to learn something about their culture.

Finally, an American participant posited, "We may have situations where we may be teaching nothing but international students through the internet and that's going to, I think, open up a different dynamic, that…we're not ready to engage."
It is clear that this study's participants acknowledge the complexities of teaching international student populations and content, and as such call for professional development opportunities that are meaningful in addressing these contexts and issues.

Discussion and Implications

Our participant pool was comprised of professors who have experience not only with foreign travel but who also speak more than one language and seek out opportunities to learn more about diverse cultures and peoples on their own. Whether using online videos of lectures from other countries on specific topics delivered in English, discussions with international colleagues about active teaching methods, reflecting and learning through experiences abroad or in-class with international learners, or personal research on materials or aids that help with their own instructional development, these professors were actively engaged in their own professional instructional development. Much of the development practices required instructors to invest their own time and money to gain new knowledge, skills, and perspectives. They were grateful for opportunities offered on their own campuses, and they took advantage of these offerings frequently.

The analysis of their perspectives offer university administration and professional development specialists important insights. Implications for future faculty development in the current era of university internationalization include thinking broadly as well as specifically about the needs of current instructors regarding teaching skills and styles, language of instruction development, cultural sensitivity in instructional interactions, and internationalization of curricula. Future learning activities for faculty should be designed with nonformal and informal opportunities that connect with faculty needs as well as the cultural and ethnic make-up of the current and future international student population at each university, and the overall internationalization goals the institution may have for the near term and in future.

Faculty development concentrating on language acquisition should incorporate offering language training at different levels and with a focus on specific disciplinary vocabulary and skills education. As well, offering best practices for teaching courses that include both domestic and international students that aid instructors in fostering collaboration and interaction across the groups was recognized across the data set, as was instructional development that emphasizes active and engaged learning techniques. Our respondents also highlighted the importance of assisting professors in identifying online resources such as lectures offered around the world on specific content, syllabi, international curricula, textbooks and educational resources infused with global perspectives, books offering insights into different cultures' values, practices, politics, and history, and diversity and intercultural communications training opportunities. Finally, findings also stressed that professors interact with other colleagues and international students at their institutions to learn about different cultural practices, instructional methods, cross-national contexts, etc. As such, faculty development programs could offer opportunities for collaborative dialogues for domestic and international instructors, as well as between international students and faculty, to learn from each other about various topics of interest regarding instructional improvement through internationalization.

Likewise, it is essential to recognize that each institution encompasses and is influenced by unique contextual and human factors. Through the lens of situated cognition and communities of practice, we can see that each university's strengths and challenges lie in the make-up of instructor experience and expertise, learning resources, diversity of international students' cultural and academic backgrounds, offerings of disciplines and programs, values, behaviors, practices, and the missions and goals of the institution regarding internationalization. It is clear that the professors in this study are personally and professionally committed to teaching and interacting successfully with international students. However, it is important to acknowledge that instructors with little or no international foreign travel experience, foreign language education, or interest in cross-cultural teaching and learning may have different motivations and require distinct professional development opportunities. Hence, faculty development specialists should design workshops/seminars on language acquisition, active learning methodologies, and cross-cultural communications. These FPD offerings can be made even more focused when they concentrate on specific international student populations attending classes. As well, gathering faculty input on their instructional needs specific to their disciplines and contexts are also imperative to meet instructors where they are in their own professional development trajectories.

Challenges and Benefits of Cross-National Educational Research Endeavors

Here we offer our reflections on the complexities and benefits of conducting AHE research in multiple international locations and collaborating across academic cultures, long distances, and time zones. We immediately needed to identify appropriate cloud-based data storage, file sharing, and virtual collaboration practices that were readily available in both locales, and we were required to be flexible regarding the scheduling of meetings at varying hours to accommodate time changes and academic calendars and vacation schedules. We also needed to negotiate across epistemological differences and found that research methodology expectations contrasted between the countries. These issues offered opportunities to expand our understandings of academia and educational research in an international context.

Through our conversations, we also realized the benefits of such research collaborations in that we acquired new perspectives on academic and research cultures by learning about doctoral student and research practices in adult education programs, differing expectations/opportunities for matriculated graduate students, and nuances in course programming. This research endeavor offered us an informal comparative study of adult education research philosophies across nations and provides us potential opportunities to publish in multiple languages. Finally, the research helped us to gain insights into the different ways instructors across disciplines view international students and teaching. As such, we believe that cross-national research collaborations in international AHE investigations will not only result in important perspectives on global adult teaching and learning but will also offer essential new directions for faculty professional development focused on cross-cultural educational interactions, teaching and learning, research, and educational policy.

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COMPARING ITALIAN PRE-SERVICE AND IN-SERVICE TEACHERS' BELIEFS ON COMPETENCE BASED LEARNING

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ABSTRACT: This research highlights pre-service and in-service teachers' beliefs on competence- based learning: Teachers who want to facilitate the acquisition, development and strengthening of competencies in their students. From an assessment perspective, such a competence-based approach implies providing students with authentic learning situations related to real life. At the same time evaluation needs to switch from quantitative and standardized tests to formative moments in which students become aware of their learning weaknesses and understand how to cooperate and use resources in order to make the most out of their learning process. The research is based on a 15-item questionnaire that was completed by 442 pre-service and in-service teachers attending a compulsory annual training course. The questionnaire's main themes are related to competencies, learning objectives, study contents, teacher-student relation, and technologies. The questionnaire, administered online during the month of April 2015 in two different Italian universities, reports as main results a statistical difference between pre service and in service teachers about the perceived importance of competencies in their teaching practice.

Keywords: competence-based education, competence-based learning, competence - based teaching, teachers' development

This paper describes the beliefs of a group of Italian teachers on the construct of competence, and on the teaching and learning practices based on this construct. The first part of the paper describes recent developments and theoretical issues addressing the competence construct in Europe, and then it focuses on related approaches to learning and teaching. These approaches highlight a focus on competence development as effective teaching practices. The second part describes an empirical study based on a survey research design. The study investigates the opinions and attitudes of pre-service and in-service teachers on issues that characterize the competence approach to teaching. The study also had the function to raise teachers' awareness on these issues while they attend training courses enhancing competence- based teaching methods in relation to the educational challenges of 21st century.

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In its recommendations related to key competencies for lifelong learning (2006) the European Parliament states that everybody needs to acquire the tools to develop the basic skills to prepare for adult life. These key competencies form the basis for further learning and are those needed for self-realization, personal development, active participation in democratic life, social inclusion, and employment. In 2008 the European Union document *New skills for new jobs: Better matching and anticipating labour market needs* identifies the skills named “transversal” because they are useful to all types of work and at all levels of employment. The “transversal” competencies are related to communication, problem solving and analytical thinking, and are necessary to perform different kinds of work. Education and vocational training must respond firmly to the needs of developing these skills because they characterize the 21st century work environment (Batini, 2013).

The competence construct can be found in many educational debates and it is the protagonist of an immense body of literature, although its definition can still be very complex (O'Sullivan & Bruce, 2014). A possible definition refers to behaviors that require the knowledge of the person and that can be implemented only through a right mix of knowledge, skills, and personal characteristics. The competence construct seems to represent an interface between different areas of learning; it is centered on the person; it allows the comparison of different ways, scopes, and pace of learning, allowing mutual acknowledgement of different national certifications (Batini, 2013). The European Qualification Framework (EQF) and the European e-Competence Framework (e-CF) have very similar definitions concerning the competence construct. Both recognize knowledge, skills, and attitudes as constituents of a competence and both define these concepts (Ravotto, 2011 pp.14-15):

- Knowledge refers to facts, principles, and theories … the “what” of learning. It is important to recognize the importance of knowledge, the cognitive dimension of learning, as fundamental for personal development although increasingly replaced by other learning dimensions such as emotional or social awareness (Calvani, 2011 as cited in Ravotto, 2011).
- Skills are defined as the “how” of the learning. They are the abilities to apply knowledge and complete the required tasks. Skills and knowledge are interconnected because knowledge gives rise to skills and skills can lead to the acquisition of new knowledge.
- Attitudes are the glue that holds together knowledge and skills. These can be explained as the ability to maintain, interpret, extrapolate, analyze links, synthesize and evaluate. Autonomy, responsibility, orientation to results, awareness, flexibility, self-orientation, ability to pose and solve problems are just some of the examples proposed by the two frameworks.

Competence-based education and its related approaches to teaching and learning prefer to “focus on outcomes (what a student knows and can do) than on inputs (how students learn, where they learn, or how long they take)” (O'Sullivan & Bruce, 2014, p. 39). Competence-based approaches consider the engagement of the learners in the acquisition of knowledge, skills and attitudes, and the use of teaching and learning strategies that facilitate the development and the demonstration of the acquired skills. These approaches have to include a clear definition of learning objectives, expected results and to provide attention to the learning styles and the needs of learners. These approaches should provide the time needed to acquire and to demonstrate the expected competencies and be able to create an environment conducive for learning (O'Sullivan & Bruce, 2014).

An important feature of competence-based education is the different function of assessment which recognizes success in learning throughout the completion of tasks and the authentic demonstration of skills. Learners have to show the acquisition of required knowledge and skills by implementing projects, by writing reports or by using concrete evidences other than a multiple-choice test (Ordonez, 2014).

Competence-based teaching requires a shared responsibility between teacher and learners, in achieving the expected results. It emphasizes the role of teacher, methods and expectations that contribute to student success.

Competence-based learning is a way to structure learning activities and to give the learner the opportunity to experience a specific set of knowledge. Learners do not simply observe and listen. They also need to experiment and to demonstrate gained expertise. The main attributes of these approaches are shown below in Table 1:

Table 1

The Main Attributes of Competence-Based Teaching and Competence-Based Learning,
Note: Adapted from O'Sullivan & Bruce, 2014

Competence-Based Teaching	Competence-Based Learning
Understanding how learners learn	Understand how one learns best (style)
Matching principles of learning and teaching	Understand exactly what is expected outcome(s) of learning
Facilitating not controlling learning	Take responsibility for one's learning
Modelling humility, critical thinking, respect, competence and caring	Motivated to learn – goal oriented
Supporting acquisition of knowledge, skills & professional behaviours in all learning domains	Ethical person and practitioner
Promote and expect learner accountability for learning	Critical thinker
Provide timely, specific feedback on learner progress beginning with learner self-assessment	Self-assess learning and performance
Individualize learning experiences according to needs	Commitment to ongoing learning
Expect increasing complexity of performance as the learner progresses throughout the programme	

In relation to teachers that attend a training course, it is important for trainers to understand the beliefs of in-service and pre-service teachers about the competence-based approach to teaching and learning, and how these opinions vary depending on previous work experience. While acting as teacher trainers we formulated four research questions:

1. What are the opinions of the interviewed teachers about the concept of competence?
2. What are the teaching experiences of the interviewed teachers related to a competence-based approach?
3. How do the opinions of interviewed teachers vary depending on their in-service and pre-service teacher experience?
4. How do the opinions of interviewed teachers vary depending on their career length?

Method

Survey research designs are procedures that differ from experimental designs as they do not involve a specific treatment realized on participants by researchers. In this procedure, researchers do not manipulate variables and it is not possible to explain cause-effect relationships as in experimental studies (Creswell, 2008). Survey research designs describe trends in data and for this reason it is similar to correlational design. Its main objective is “learning about a population and less on relating variables or predicting outcomes” (Creswell, 2008, p. 388). This survey research adopts a cross-sectional design because it “collects data at one point in the time” (Creswell, 2008, p. 389) affording the possibility to understand attitudes, beliefs, opinions, or practices in use.

Participants

The study involved 442 teachers (F = 72% M = 26%). The age of the sample ranged from 23 to 66 with an average of 41. In-service teachers declared to have an average of 11 years of teaching. Pre-service teachers are 70 (19 %). Among the 442 participants 9% declare to teach in nursery schools, 20% in primary school, 53% in lower and upper secondary school, 3% as educator of learners with disabilities, and 1% teach in private schools. As participants attended training course at the University of Padua and at the University of Perugia, the majority of them came from the north-east and the center of Italy.

Procedure and Instrument

Each participant participated in blended learning and had the possibility to access the questionnaire through a link posted in the online course (Moodle) platform. Authors used on online tool to build the questionnaire.

The first section of the questionnaire collects socio-demographic information concerning the participants such as age, gender, career length, level of school in which they teach, and the area of residence. The second section includes a first multiple choice question and 14 items belonging to four core themes (see Table 2).
The perceived importance of teaching contents respect to competencies is the first core theme and it includes five items with a five level Likert scale (1 = strongly disagree 5 = strongly agree). The perceived importance of learning objectives, the second core theme, includes two items with a five level Likert scale (1 = strongly disagree 5 = strongly agree) and an open-ended question.

The perceived importance of student-centeredness, the third core theme, includes three items to be assessed according to a five level Likert scale (1 = strongly disagree 5 = strongly agree). The perceived importance of authentic tasks, the last core theme, includes a first question with an ordinal scale of four levels (1 = never 4 = always), a second multiple choice question, and a third open-ended question.

Data Analysis

The percentage of participants' responses to the first multiple choice question was calculated in order to understand the most shared definition of competence. Then a

Table 2
The Thematic Core and the Relative Items, in the Questionnaire Created by the Authors.

Perceived importance of teaching contents in respect to competencies.	• It is appropriate to give greater importance to the disciplines and to the teaching contents. • It is urgent to reduce the importance of the lectures and promote a competence-based education. • It is appropriate to decrease the importance of the relationship with students and give more importance to the teaching contents. • Learners must acquire contents and notions not competencies. • Teachers and contents need to be at the center of education.
Perceived importance of learning objectives	• It is important to teach starting from learning objectives. • Learners and learning objectives need to be at the center of education. • Could you summarize in few words a didactic action with a learning objective?
Perceived importance of students-centeredness	• Teaching is based on relationship with students. • It is important to understand how students learn, what their problems are, and to adapt teaching behaviors to learners' characteristics. • It is possible to entrust an important assignment to a learner if

	the teacher need it.
Perceived importance of authentic tasks	• Do you normally use activities during the lesson? • Do you normally assign authentic tasks during the lesson? • Could you provide an example of an authentic task assigned recently?

factorial analysis was conducted to confirm the possibility of clustering the items in the first three core themes (perceived importance of teaching contents in relation to competencies, perceived importance of learning objectives, perceived importance of students-centeredness). In addition, the difference between the means of the scores expressed by the participants was also calculated. To understand the differences between different classes of participants grouped by career length, a one way ANOVA was used as the independent variable, distinguishing participants in 9 groups (see Table 3) and the dependent variable, the three dimensions of the questionnaire, is continuous. To understand the differences between pre-service and in-service teachers, a t-test was used as the independent variable, distinguishing the participants into two groups (see Table 4) and the dependent variable, also in this case the dimensions of the questionnaire, is continuous.

The second dimension, related to learning objectives, presents an open ended question that asked participants to describe a didactic action with a learning objective. For this question the frequency of the most used words was calculated and some of the most interesting examples were selected.

Table 3

Descriptive Statistics of Participants Grouped by Career Length

Career length (in years)	**N**	**Mean**	**Standard deviation**
0	70	1,88	,570
1-5	93	2,12	,677
6-10	57	2,10	,586
11-15	34	2,10	,491
16-20	30	2,39	,750
21-25	30	2,18	,734
26-30	16	2,24	,807
31-35	16	2,29	,628
36-40	15	2,51	,728
41-45	2	2,80	,283
Total	363	2,13	,658

Table 4

Descriptive Statistics of Participants Grouped as Preservice and In-Service Teachers

Groups	N	Mean	Standard deviation
Preservice	70	1,88	,570
In-service	293	2,19	,665

Finally, to understand the fourth thematic core (perceived importance of authentic tasks) the response rates for the first two questions were calculated. Again the most significant examples reported by the participants (in relation to the third question) were selected.

Results

The first item of the questionnaire is a multiple choice question that asked participants to choose the definition that fit better with their own idea of competence. The most shared definition (64% N= 283) is that of competence as the ability to use a structured set of knowledge and skills, during work, study or in professional and personal development. The following are the other less shared definitions of competence: the ability to act and to react autonomously in complex situations (24% N=105), the knowledge to develop an ability (2% N = 9), a mix of knowledge and skills (2% N = 8), a mix of knowledge, skills and personal characteristics (8% N = 37).

The authors conducted a factorial analysis using items to be assessed on a five levels Likert scale identifying three main dimensions. These dimensions explain 50.8% of the variance (see Figure 1).

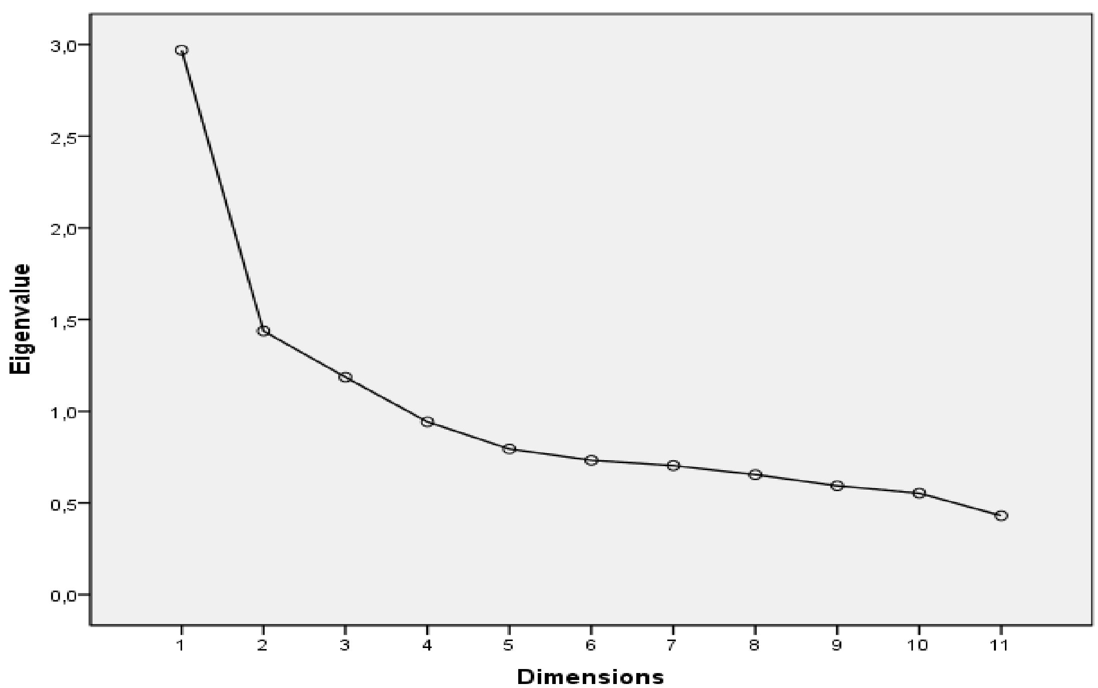

Figure 1. Graphic representation of the main dimensions in the questionnaire

Reading and interpreting the most saturating items, it is possible to group them confirming the existence of the three core themes established by the authors:

- Perceived importance of teaching contents in relation to competencies.
- Perceived importance of learning objectives
- Perceived importance of student-centeredness

For each of the three dimensions listed above, the differences in participants' expressed scores were explored, taking into account the career length and the state of service. Only for the first dimension, was a significant statistical difference in the mean of scores identified. The following null hypothesis to test the scores with a one way ANOVA and a t-test was formulated:
H0: There is not a statistically significant difference in the mean of scores related to the perceived importance of teaching contents in relation to competencies on the basis of career length.

Results of the one way ANOVA allows us to reject the null hypothesis and to accept the hypothesis that there is a significant difference in the perceived importance of competence in relation to teaching contents between groups of participants with different seniority $F(9, 353) = 2.7$, $p = .005$. The importance given to competencies is greater for the group of participants with no years of service, especially compared to the groups of participants with 11-15 and 31-35 years of service (see Figure 2).
Thus a second hypothesis was formulated in order to understand whether pre-service and in-service teachers had different beliefs related to the importance of competencies.
H0: There is no significant difference in the mean of scores related to the perceived importance of teaching contents in relation to competencies for pre-service and in-service teachers.
The t-test shows that there is a significant difference between the two groups allowing us to reject the null hypothesis $t(361) = -3.5$ $p = .0$

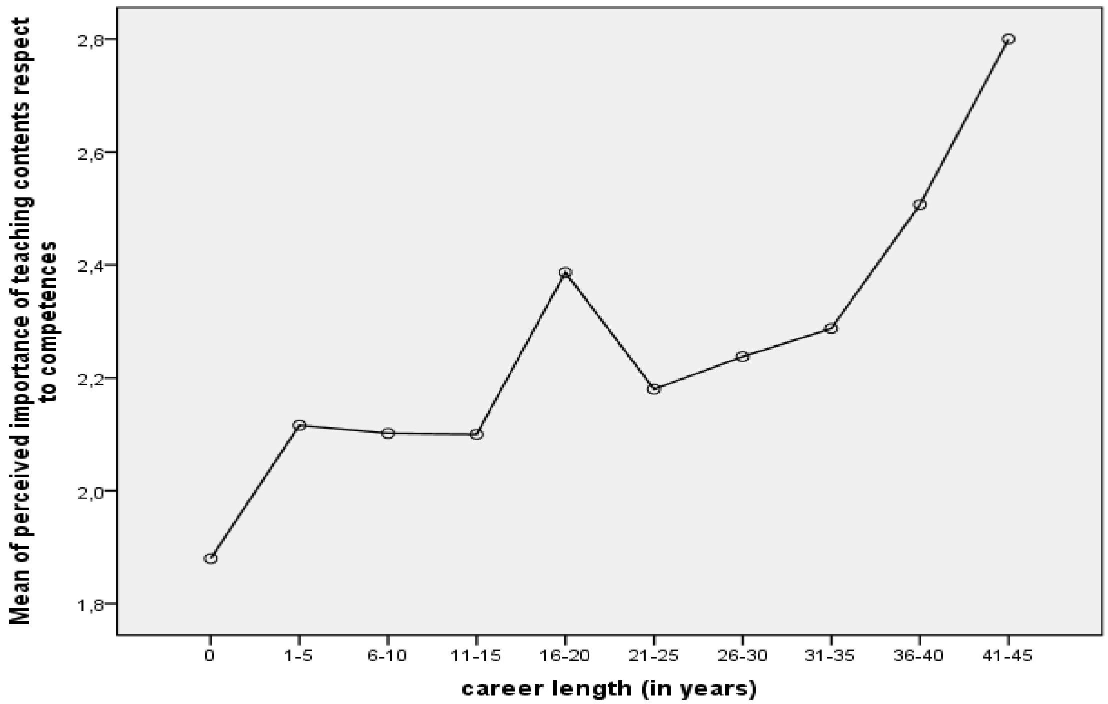

Figure 2. Graphic representation of the statistical difference between the groups for the dimension of perceived importance of teaching contents with respect to competencies

An open-ended question was formulated to integrate the second dimension "perceived importance of learning objectives," asking participants to summarize in a few words a didactic action with a learning objective. The frequency of the most used words was calculated (see Table 5).

Table 5

Frequency of the Words used to Summarize a Didactic Action with an Objective

Words	Frequency
Objective	336
Dydactic	297
Action	318
Text	277
To know	259
Activity	241
Student	226
Capacity	212
Reading	199
Kids	187
Knowledge	177
Group	167
To understand	158
Learning	150

Participants reported various and significant examples of didactic actions realized during their courses (see Table 6). The most representatives were chosen according to qualitative content analysis (Mayring, 2000).

Table 6

Examples of Didactic Actions Reported in the Questionnaire

Learning objective	Didactic action
Learn to listen, repeat and elaborate a melodic idea.	Improvisation on a scale of five sounds on a distinct tone, a student listens from another student a short melody, repeats and elaborates it, then it is the turn of another student.
Learn to orient consciously and detect morphological, economic and artistic characteristics of a place. Experiment methodological, linguistic, social and civic skills.	produce a power point to describe a city, using images and maps.
Learn the concept of fraction.	Splitting up a chocolate bar, distribute a part to each student, and transfer experience in mathematical terms.

As previously reported, a fourth core theme named "perceived importance of authentic tasks" was addressed on the basis of three questions. Participants could respond to a first multiple choice question, to a second question with a four level ordinal scale (1 = never 4 = always) and to a third open-ended question. Table 7 presents the percentage of responses for the first two questions.

Table 7

Percentage of Responses to the First Two Questions Related to Perceived Importance of Authentic Tasks

Do you normally use activities during the lesson?	**N**	**%**	**Do you normally assign authentic tasks during the lesson?**	**N**	**%**
Never	90	20%	At the beginning of each module	67	15%
Sometime	152	34%	During each lesson, I believe that without activation students cannot learn	238	56%
Often	156	35%	Never	23	5%
Always	44	10%	Occasionaly	89	20%
			Usually I explain, discuss and then have oral exams	25	5%

In the last open ended question participants could mention an example of an authentic task (Herrington, Parker, & Boase-Jelinek, 2014) used in their class. Table 8 provides examples that qualitative content analysis indicated as the most interesting.

Table 8

Examples of Authentic Task Reported in the Questionnaire

Starting from students' inadequate behaviors in class, they analyzed the causes and consequences. They discussed the themes of friendship and respect for the diversity, pupils found through different types of texts (poetic, narrative, etc.) ideas that led them to identify some possible solutions to the problem. They verbalized their assumptions, their personal thesis and compared them with those of others.
Project: create a radio jingle for a product. Realize melody and text. Target: young people Duration of the jingle: 10-15 seconds Resources: music instruments, papers, pencils, erasers, journals to choose an example of product, the internet Deadline: one week
In order to help their parents in preparing something different for lunch, I assigned to students, attending the second year of an upper secondary school, a research assignment on nutrition during the middle ages. Students chose an afternoon to prepare, with the help of their parents, typical dishes.

Discussion and Conclusion

It was possible to gather Italian pre-service and in-service teachers' most shared definition of competence through an on-line questionnaire. The questionnaire was also instrumental in collecting information about teaching experiences related to the competence-based approach, and to identify some differences in relation to teachers' beliefs.

Factorial analysis confirms the selected core questionnaire themes. This analysis confirms the existence of the three investigated dimensions: the importance that participants attribute to teaching content in relation to competencies, the importance attributed to learning objectives as starting point for competence-based learning, and the emphasis on the students' role as key factors in implementing competence- based education. In addition to these three dimensions, a fourth core theme is emerging. This theme relates to the use of authentic tasks and to activities that distinguish a competence-based approach from a traditional one.

In relation to the first research question the majority of participants define competence as the ability to use a structured set of knowledge and skills, during work, study or in professional and personal development. This definition is quite consistent with the definition provided by the European Union as both identify the concepts of knowledge and skills as important elements of competence and as related to the learners' personal and professional sphere. In terms of further research, it would be interesting to understand how the choice of such definition varies depending on teachers' career length.

The second research question addresses teachers' experiences in relation to the use of learning objectives and authentic tasks. Teachers report a range of creative examples, although only 10% of teachers state that they always use this active teaching approach. Only 56% of teachers say that they always use authentic tasks during their lessons. These results indicate an inconsistency in relation to teachers' understanding of formal education methods and teachers' practices. When combining the responses to the first and to the second research questions, it seems that the dominant European Union discourse concerning competence-based teaching has been adopted in principle by the majority of this Italian sample of teachers. On the contrary, the teaching practice of these teachers has remained relatively unaffected by the competence -based approach with only half of them focusing on authentic tasks and only one out of ten actually adopting an active teaching approach as their regular educational approach.

The gap between the EU discourse and the teachers' practice enhances the importance of the answers to the third and the fourth research questions that aim at investigating possible differences of teachers' beliefs. While it is not possible to confirm significant differences in the dimensions related to the importance of learning objectives and to the centeredness of learners, it is possible to say that the perceived importance of the competencies in relation to the teaching contents is higher in pre-service teachers when compared to teachers who already have a longer career. This difference shows that the greater the experience of teachers, the less they tend to accept changes introduced to improve teaching practice. On the contrary, pre-service teachers and those in the early years of their career are more influenced by the initial training (Batini & Surian, 2015).

Overall, the questionnaire seems to function as an interesting instrument to understand teachers' beliefs about competence- based approach to education and related educational choices to match learners' salient features. During blended learning courses, discussing the results with the participants can motivate them to a better understanding of competence-based education and of its practical implication in terms of teaching methods. During face-to-face feedback, teachers who were participating in the Padova and Perugia blended learning courses expressed their various difficulties in relation to the possibility to change their way of teaching within a school system which is still dominated by traditional ways of lecturing and oral exams. In relation to these features of the Italian school system such combination of quantitative and qualitative data gathering during teacher training courses, indicates positive results in order to raise teachers' awareness about innovative instructional practices, especially with future generations of teachers.

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CUTTING EDGE DISCOVERIES FOR THE 2015: CAPSULE OF A HISTORY AND PHILOSOPHY OF ANDRAGOGY

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ABSTRACT: This 2015 updated capsule on a History and Philosophy of Andragogy includes nine new items and is mainly limited [with a few exceptions] to a chronological history and the accompanying philosophy of andragogy, in line with when the English language documents were published and personal descriptions of events were recorded. Some of these documents, however, present aspects of the events and ideas which recount the years and contexts prior to the time in which they appeared in published form. To date, nearly 500 documents have been discovered, but space limitations in this paper allowed the inclusion of only 140 – a fraction of the total number. Each of 16 eras is articulated with selected works and the cutting edge discoveries are found mainly in the most recent era.

Keywords: Andragogy, eras, history, philosophy

Major Eras in the History and Philosophy of Andragogy

This history and philosophy study of andragogy has 16 eras that are identified. As near as possible, I have presented the documents mostly in the order in which they were published. Obviously, some of them indicate stages and years of development that are not strictly chronological. Nevertheless, the order in which they are presented provides a process of building and stronger case for considering andragogy as a viable part of the field of adult education.

Early Appearances of Andragogy: 1833-1927

The term 'andragogy,' as far as we know, was first authored by Alexander Kapp (1833), a German high school teacher. In the book entitled '*Platon's Erziehungslehre'* (*Plato's Educational Ideas*) he describes the lifelong necessity to learn. Kapp refers to vocational

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education of the healing profession, soldier, educator, orator, ruler, and men as the family father. Here we find patterns which repeatedly can be found in the ongoing history of andragogy: Included and combined are the education of inner, subjective personality ('character'); outer, objective competencies (what later is discussed under 'education vs. training'); and, that learning happens not only through teachers, but also through self-reflection and life experience, which makes it more than 'teaching adults.' The term andragogy lay fallow for many decades, until the 1920s, as it became used in the Workers Education Movement (Reischmann, 2004).

Lindeman (1926) from the USA traveled to Germany and became acquainted with the Workers Education Movement. He was the first to bring the concept to America. Although he clearly stated that andragogy was the method for teaching adults, the term did not take hold in the new land until many years later.

Andragogy's Second American Appearance and its Foundation Being Established 1964-1970

Another extensive period of time elapsed until the term andragogy was published in English. This time, it appeared in Great Britain. Simpson (1964) proposed and issued a call that andragogy could serve as a title for an attempt to identify a body of knowledge relevant to the training of those concerned with Adult Education. Knowles (1970) indicated that he acquired the term in 1967 from Dusan Savicevic. [It was actually in 1966 (Sopher, 2003)]. However, after becoming acquainted with the term, Knowles infused it with much of his own meaning garnered from his already extensive experience in adult education.

Knowles' (1970) andragogical expression took the form of a process design instead of a content design, with assumptions and processes. The assumptions about adult learners at that time were: They are self-directing, their experience is a learning resource, their learning needs are focused on their social roles, their time perspective is one of immediate application. The learning processes adults want to be actively and interactively involved in are: Establishing a climate conducive to learning, cooperative planning, diagnosing their needs, setting objectives, designing the sequence, conducting the activities, and evaluating learner progress.

Movement Toward Applying Andragogy To Human Resource Development: 1971-1973

Furter (as cited in Faure, 1972), from France, proposed that universities recognize a science for the training of man to be called andragogy. The purpose would be to focus not on children and adolescents, but on man throughout his life. Ingalls (1972) provided the first handbook guide to using andragogy in helping adult educators [they called them 'trainers' in those days] become more systematic and consistent in their engaging learners in the learning process. This was developed and tested in a branch of the US

Government. Knowles (1973) focused a full application of his conception of andragogy toward the Human Resource Development (HRD) Movement. He worked vigorously in the corporate sector and thus saw the importance of testing and relating andragogy within it.

Emergence of Self-Directed Learning Skills As a Major Way to Implement Andragogy: 1975-1981

Knowles (1975) published his guidebook for learners and teachers on the topic of Self-Directed Learning. This was the first time that he labeled pedagogy as ‘teacher-directed’ learning and andragogy as ‘self-directed’ learning. Previously, pedagogy was for children and andragogy was for adults.

Mezirow (1981) developed a critical theory of adult learning and education, and laid the groundwork for what he called a charter for andragogy. This included the core concepts that would enhance adults’ capability to function as self-directed learners. Suanmali (1981), a doctoral student of Mezirow, focused his dissertation research on Mezirow’s charter for andragogy. He found support and agreement among 174 adult education professors and practitioners for andragogy, that the educator must: decrease learner dependency, help learners use learning resources, help learners define his/her learning needs, help learners take responsibility for learning, organize learning that is relevant, foster learner decision-making and choices, encourage learner judgment and integration, facilitate problem-posing and problem-solving, provide a supportive learning climate, and emphasize experiential methods.

Strengthening the Numerous Uses of Andragogy Along With Growing Controversy and Resistance Toward It: 1981-1984

Both the Nottingham Andragogy Group (1983) and Allman and Mackie (1983) addressed their beliefs about adults and adults’ abilities to think creatively and critically in learning settings. Their perspective on andragogy is clearly driven by research in adult development through life phases. They also reported a belief that Alexander Kapp, a German teacher, first used the word andragogy in 1833 to describe the educational theory of Plato.

Nonetheless, some lack of enthusiasm about Knowles’ andragogy concept was reflected by Hartree (1984). She expressed the feeling that Knowles’ andragogy did not live up to what she interpreted as his desire for its becoming a comprehensive learning theory for adult education.

Jarvis (1984) wrote that the theory of andragogy had moved into the status of an established doctrine in adult education. However, he thought it did not have the grounding in sufficient empirical research to justify its dominant position. Not to be deterred at this point, Knowles (1984) presented the first book in which he cites thirty-six extensive case examples of applying andragogy in practice. In it he revealed what worked and what did not.

Identifying the Stronger European Base of Andragogy in Comparing it with the American Base: 1985-1988

Yonge (1985) perceived the European concept of andragogy as being more comprehensive than the American conception. He considered that most Europeans do not use the terms andragogy and adult education synonymously. Taylor (1986) offered a very strong and articulate research based model for the andragogical process of transition into learning for self-direction within the classroom. This is from the learners' point of view and has various phases on a cycle of what may be characterized as a cultural journey. Ross (1988) connected the concept of andragogy and its value with some of the research on teacher effectiveness. He believed that teachers' behavior relates to student achievement. Davenport (1987) questioned the theoretical and practical efficacy of Knowles' theory of andragogy. He suggested that adult education would simply be better off to drop the word from its lexicon.

The Foundation of Trust Undergirds Andragogical Learning Despite The Andragogy Debate: 1989-1991

Henschke (1989) developed an andragogical assessment instrument entitled, Instructional Perspectives Inventory (IPI). The central and strongest major core of this instrument was originally and still is a focus on the teacher trust of learners. Nadler (1989) stated that Human Resource Development (HRD) is based in learning, and every HRD practitioner should have an understanding of the theories of Adult Learning. This was a crucial observation, because many in HRD have overlooked that consideration. Krajinc (1989) perhaps provides the most beneficial definition of andragogy. She states, "Andragogy has been defined as…'the art and science of helping adults learn and the study of adult education theory, processes, and technology to that end' " (p. 19). Long (1991) speculated that although Knowles' form of andragogy is weak in empirical confirmation, it has survived the criticism leveled against it. Two reasons are that Knowles is a leader in the field and is widely respected for other contributions.

Scientific Foundation of Andragogy Being Established Amid Skepticism and Misunderstanding: 1991-1995

Savicevic (1991) provided a critical consideration of andragogical concepts in five western European Countries, and five eastern European Countries. He also drew on sources from ancient times. This comparison showed common roots and indicated endeavors toward andragogy as a fairly independent scientific discipline. Additionally, he credited J. A. Comenius in the seventeenth century with being regarded the founder of andragogy.

At this time, there was again strong criticism of American andragogy, and that coming from Candy (1991) in Australia. At the time Knowles' articulated andragogy, self-expression and personal development were in vogue. Thus, self-directed learning and andragogy were gaining some prominence in becoming known as autonomous learning. Houle (1992), in contrast, emphasized the impact of Knowles on American andragogy, and how he worked this out in practice especially in non-school settings and the workplace. He went on to indicate that scholars and theorists may find great value in Knowles' (1993) discussion of the development of learning theories in the educational literature, his exploration of the roots of his own thinking about theorizing. Knowles (1993) articulates on a very critical variable in andragogy, and the level of the learner's skill in taking responsibility for his or her own learning.

Knowles (1993) claimed that the andragogical model of adult learning provides guidelines for gearing Christian adult education toward the development and support of 'mature Christian persons' in contrast to 'dependent Christian persons.' The possible directions of Christian maturation include:

From (The Pedagogical Model)	Toward (The Andragogical Model)
■ Dependence on others for religious ideas	■ Ability to identify and think about religious issues for one's self
■ Ignorance of the traditions and literature of the Christian church	■ Informed understanding of the traditions and literature of the Christian church
■ Passive conformity to prevailing patterns of behavior of church members	■ Creative questing for continuously more effective ways to translate Christian ideals into behavior
■ Narrow interest in religious matters	■ Constantly expanding interest in religion
■ Selfish concern for personal problems	■ Altruistic concern for the welfare of others
■ Vague definition of personal value system	■ Clear and integrated perception of personal value system
■ Self-righteousness about state of personal religious development	■ Humility about state of personal religious development
■ Fragmentary application of Christian ideals to life	■ Total application of Christian ideals to life

Hooks (1994) said "the possession of a term does not bring a process or practice into being: concurrently one may practice theorizing without ever knowing/possessing the term…" (p. 61). It is sometimes later that this kind of practice is given a label that comes into common use. In this case the label would be andragogy. Poggeler (1994) listed trends which he hopes will be helpful for future development of European andragogical research. These include at least: International knowledge, "development-andragogy" of the Third World, and understanding the "lifeworlds" of the participants. Zmeyov (1994) clearly supported andragogy. He stated that the most important trend in adult education in Russia is the application and further development of Knowles' (1970, 1980) theory of adult learning, or andragogy.

Momentum Gained Against Andragogy While Counter Arguments Assert Its Value: 1995-1998

Welton (1995) asserted that "the 'andragogical consensus'…formulated by the custodians of orthodoxy in the American Commission of Professors in the 1950s and solidified by Malcolm Knowles and others in the 1960s and 1970s, has unraveled at the seams" (p. 5). He articulated that the fundamental accusations expressed are because this perspective inadequately serves the interests of the disenfranchised in North American society. VanGent (1996) asserted that andragogy has been used to designate the education of adults. He considered that its future lies only as a generic term for adult education. Hanson (1996), from the other side of the discussion, called for adult educators not to search for a separate theory of adult learning [andragogy]. He suggests that we remove many of the unsubstantiated assumptions based on almost utopian beliefs about the education and training of adults linked to un-contextualized views of learning and empowerment.

Houle (1996), in talking about Knowles' work in andragogy said that it remains the most learner centered of all patterns of adult educational programming. He also added a number of other things. Knowles kept evolving, enlarging, and revising his point of view and therefore became something of a moving target, particularly since he was intimately involved with numerous projects at every level of magnitude in both customary and unusual settings all over the world. He could bring to discussions and debates a wealth of experience that his opponents could not match. In addition, some of his followers developed variant conceptions of andragogy, thereby enlarging the discourse. Knowles idea on andragogy had application to a wide variety of settings. Houle concluded by saying,

> Those who wish to do so can wholly contain their practice in the ideas expressed by Knowles and others, establishing appropriate physical and psychological climates for learning and carrying forward all of its processes collaboratively. Far more significantly, andragogy influences every other system. Even leaders who guide learning chiefly in terms of the mastery of subject matter, the acquisition of skills, the facing of a social problem, or some other goal know that they should involve learners in as many aspects of their education as possible and in the creation of a climate in which they can most fruitfully learn (p. 30).

Antecedents to a Historical Foundation of Andragogy Being Extended and Broadened : 1998-2000

Henschke (1998a) asserted that long before the term andragogy appeared in published form in 1833, ancient Greek and Hebrew educators, if not others, used words that although they were antecedents to andragogy, included elements of the concept that has come to be understood as some of the various meanings and definitions of andragogy. He attempted a descriptive definition of andragogy that moved in the direction of calling it a scientific discipline of study. This he posed in contrast to what others considered to be a fading influence of andragogy. He went back earlier in history and claimed that the language of the Hebrew prophets, before and concurrent with the time of Jesus Christ, along with the meaning of various Hebrew words and their Greek counterparts -- learn, teach, instruct, guide, lead, and example/way/model -- provide an especially rich and fertile resource to interpret andragogy. He expected that by combining a probe of these words and elements with other writings, a more comprehensive definition of andragogy may evolve.

Draper (1998) in providing an extensive, world-wide background on andragogy, reflected on and presented an overview of the historical forces influencing the origin and use of the term andragogy: The humanistic social philosophy of the 1700s & 1800s, the early twentieth century labor movement in Germany and USA, international expansion of adult education since World War II, commonalities of different terminologies, the debate in North America, the progressive philosophy underlying andragogy in North America, stimulation of critical discussion and research, and the viability of andragogy as a theory.

Empirical Research Being Pressed for Investigating Andragogy's Value While Objections Remain: 2000-2002

Billington (2000) found that with sixty men and women from ages 37 to 48, there were a number of key factors relating to andragogy that helped them grow, or if absent made them regress and not grow. The factors were: A class environment of respect; their abilities and life achievements acknowledged; intellectual freedom, self-directed learning, experimentation and creativity encouraged; learner treated fairly and as an intelligent adult; class is an intellectual challenge; interaction promoted with instructor and between students; and, regular feedback from instructor.

To the arguments that question the value of Knowles' approach to andragogy, Maehl (2000), in addressing the philosophical orientations of a number of adult educators, suggests that Knowles led in the direction of making andragogy quite humanistic that gained wide adoption in the field. This approach also was fused with other philosophies, particularly in human resource development applications. He also emphasized that Knowles elaborated his ideas of self-directed learning within the context of andragogy. This influenced a generation of adult educators, through his sensitive and nurturing spirit, to adopt the practice of andragogy broadly. What drew and maintained a strong following was what Maehl described Knowles as advocating.

Rachal (2002) clearly identified seven criteria suitable for implementation in future empirical studies of andragogy: Voluntary participation, adult status, collaboratively-determined objectives, performance-based assessment of achievement, measurement of satisfaction, appropriate adult learning environment, and technical issues. This certainly presents a challenge to those in the field that may be willing to expend the energy to conduct any empirical research study on the results of andragogy.

Bringing European and American Andragogy Closer Together As Distance Education Emerges: 2003-2004

Showing the strength of andragogy through its long history in Europe, Savicevic (2003) indicated that comparative andragogy has numerous elements that are essential in addressing this scientific research topic. Those eight elements included in the book are: Comparative perspectives of education and learning of adults; historically-comparative researching in andragogy; andragogical comparisons in our cultural environment; international dimensions of adult education; conceptual and linguistic standardizing in andragogical comparisons; theoretical and methodological scope of comparative andragogy; currents of constitution of comparative andragogy; and, conclusions concerning comparative andragogy.

Sopher (2003) asserted that Malcolm Knowles taught her more about adult education than even he realized. Her experience of learning with him in 1991 was a magical experience that she still recalled 12 years later in 2003 as if it happened yesterday. For her, experiencing Knowles 'the person' and Knowles 'the facilitator of adult learning' was seamless –his modeling every aspect of what he taught and wrote, a process that was consistent, authentic and practical. In order to understand his method, one would need to experience it directly – it was like his facilitation of participants' learning was done throughout any given day as with the grace of a skilled conductor directing an orchestra. Her thought was that the main reason Malcolm's hierarchy of andragogy did not appear in his publications is that it would be challenging for anyone to separate him personally and professionally. Moreover, it would have been more challenging for Knowles to reflect on details of his practice that are tightly intertwined with him on a personal level.

Drinkard and Henschke (2004) found nurse educators who have a doctoral degree in other than nursing (adult education to be specific) as more trusting of their learners in an andragogical classroom than nurse educators who have a doctoral degree in nursing. This was largely due to the lack of anything regarding how to facilitate the learning of adults in the nursing doctoral program, as contrasted with facilitation of the learning of adults being a very prominent part of the adult education doctoral programs where andragogy is actively practiced.

Illeeris, (2004) a Danish adult educator for 30 years, who by his own declaration is not an andragogue, but a pedagogue, was convinced that adults need to be actively involved in developing and executing adult education programs. He asserted that it is of "… entirely decisive importance that the point of departure of planning is that the participants in adult education programs are *adults*, humans that both formally and in reality are responsible for their own actions and decisions" (p. 163). He went on to indicate here that he is quite in line with Knowles in his agitation for andragogy as a discipline, which is in many ways different from the pedagogy of children's schooling and upbringing.

The Hesitation Concerning Andragogy Continues While Many Still Stand By Andragogy: 2005-2006

Sandlin (2005) admitted that andragogy was a cornerstone of adult education for many decades. Notwithstanding, she has serious reservations about its prominence, and critiques it within the Africentric, feminist, and critical adult education perspectives. Stanton (2005) related the andragogical concept to the concept of readiness for self-directed learning. There was not only congruence between the two, but also the Henschke (1989) Instructional Perspectives Inventory [IPI] was validated as an almost perfect 'bell-shaped' measurement of an andragogical facilitator.

Wilson (2005) conducted this predictive study which tested the theory of andragogy in a post-secondary educational setting. It produced a sound psychometric instrument (ALPDEQ) presumably named "Adult Learning Professional Development Educational Questionnaire." It is one of the first to successfully isolate adult learners, a major step forward in testing andragogy. Results provided insight of andragogy's effect on two student outcomes, learning and satisfaction. The findings revealed adult learners enrolled in a MBA degree program provided evidence of learning and were not influenced by andragogy. However, satisfaction with instructor and course was affected by perception of andragogical teaching behaviors exhibited by faculty. The study included many exploratory faculty and student characteristic variables, never before studied, and results indicated characteristics, above and beyond age, gender, and ethnicity, were predictors to learning and satisfaction.

Another use of the principles of andragogy is in the public school setting. The purpose of Stricker's (2006) research was to determine the attitudes of principals toward teachers as learners by answering the following question: Do principals understand adult learning (andragogy) and do they have the competencies to create the conditions conducive for learning in school based staff development? He found a relationship between principals and teachers that does not contribute to creating the conditions conducive for adult learning in school based staff development. He posited that principals in this district would benefit by a better understanding and implementation of andragogy. Teachers, on the other hand, would also benefit from gaining understanding and implementing self-directed learning so they may become actively involved in and take responsibility for their own continuing, lifelong learning.

Knowles' Prominent Long Range Contribution to Andragogy's Continuance into the Future: 2006-2011

Savicevic (2006a) expressed his realization that almost 50 years of experience with andragogical ideas acquired in different social, cultural and educational environments, are reflected through the prism of his personal experience. Very importantly, he also observed that since his first visit to the USA in 1966, up through 2006, the identifiable trace of andragogy on USA universities is that there had not been a single serious study on adult education and learning that did not refer to andragogy as a conception. Savicevic also addressed the diversity of andragogical ideas in an international framework, which also became obvious in the expanding depth, breadth, worldwide nature of this research.

Isac (2006) analyzed the five distinct features Lorga and Gusti explicitly or implicitly asserted concerning andragogy in the interwar Romania: There is a peculiar difference between andragogy as theory (i.e., the principles of adult education) and the practice of adult education. In their efforts to innovate, adult education was completely neglected during the Communist Regime from 1945 to 1989. As a consequence Romania did not have enough time to succeed with desirable outcomes of reaching a uniquely Romanian theoretical paradigm of 'andragogy'. Therefore, Isac suggested that it is now up to the post 1989 Revolution to reconsider and seek to renew these valuable traditions according to contemporary imperatives of the European Union.

Savicevic (2006b) reflected about his perception of Knowles' position in sustaining andragogy over the long range of its history into the future.

> Forty years in development of a science is not a long or ignorable period. I met professor Knowles four decades ago and argued on term and on concept of andragogy. Since then, the term and the concept of andragogy enlarged and rooted in the American professional literature. There is no doubt that Knowles contributed to it, not only by his texts, but with his spoken word and lectures. He was a 'masovik', i.e., a lecturer on mass events. He told me that he lectured on 10,000 visitor stadiums. As if he was inspired by an ancient agonistic spirituality! His contribution to the dissemination of andragogical ideas throughout the USA is huge. The history of andragogy will put him on a meritorious place in the development of this scientific discipline. (p. 20)

Although Newman (2007) declared he was not a fan of andragogy, he said that in his estimation Knowles had contributed something to adult education and andragogy that was quite unique. As he thought it through, he came to the conclusion that Knowles provided a means to assess the needs of adult learners, and he could not detect that any other adult educators provided such. They only had talked about assessing adult learner needs. Knowles had provided an elaborate system in which one came up with a model of competencies for being an excellent adult educator drawn from a number of sources.

Then that same person would assess (on a Likert type scale) her/his level of functioning on each of the competencies. Next, the person would go back to the competencies and indicate the level s/he thought was required for effectively doing the particular task at hand. Finally, the person would select the competencies to work on and improve that exhibited the largest gap between their present level of performance and required level of performance.

Cercone (2008) asserts that the online educational environment is increasingly being used by adults and should be designed based on the needs of adult learners. This article discusses andragogy, an important adult learning theory, and reviews three other adult learning theories: self-directed learning, experiential learning, and transformational learning. During this discussion, the theories are examined for the ways in which they may be applied to the design of online learning environments. In addition, the 13 characteristics of adult learners developed by the author are examined, and an analysis of how these characteristics influence the design of an online learning is presented. Recommendations follow regarding how to design an online classroom environment while considering the application of adult learning theories. Of the 13 characteristics developed by the author, andragogy is the most comprehensive as it considers 10 of the characteristics, experiential learning only considers four [4] characteristics, self-directed learning theory considers three [3] characteristics, and transformative learning theory considers three [3] characteristics. The author provides a total on 93 techniques for helping address and enhance the 13 adult learner characteristics.

Henschke (2011) considers that andragogy has much to contribute to the vibrant future of the adult education and learning field. He bases this on his research of having discovered and identified at that time at least 330 English Language documents that had been published on andragogy. Despite resistance from various quarters of the field, some of the more astonishing and seemingly positive and valuable empirical and experiential findings relate to effectively applying andragogy to internet learning, andragogy being more effective than pedagogy in preparing police for their role in society, and an Arab and American jointly contending "…that andragogical adult educational theory, processes, and research are elemental to a vision of a peaceful world and a stabilized Iraq" (p. 36).

Henry (2011) said that the purpose of his book is twofold: to trace the evolution of the thinking of Malcolm Knowles over the period 1950 to 1995 and to show that during the course of his writing he developed a clear and coherent conceptual framework. This book is a journey through the pages of Knowles' major writings. It plots the emergence of new ideas in the sequence in which they occurred and provides an account of the overall development of Knowles' thought. This book does not attempt to impose viewpoints on Knowles but strives to allow an authentically "Knowlesian" andragogical perspective to emerge according to what the principal writings themselves disclose.

Clearer Emphasis on Congruence between Scholarship and Practice Accompanied by Contribution to the Shaking World Economy: 2012-2014

Henschke (2012b) talks about his work in Nation Building through andragogy. He indicates that his international experience of and involvement in the very essence of exemplifying a conception of the following in various countries around the globe – nation building through andragogy and lifelong learning: on the cutting edge educationally, economically, and governmentally. Although he has been privileged to engage adult learners in research and learning experiences in a dozen countries through andragogical and lifelong learning processes, he presents here only a sketch of his personally unique approach of work and learning in what he calls 'nation building' with people in five countries: Brazil, South Africa, Mali, Thailand, and Austria. His purpose is to clearly articulate some of the who, what, when, where, why and how of his most successful facilitation activities of helping adults learn in such a way that any adult educator, who may be disposed and committed to do so, could learn these processes and replicate them with others.

Henschke (2012c,d,e,f) also presents various research findings of the element of trust in andragogical learning. With each finding, trust is strengthened as important in learning.

Risley (2012) discovered an important aspect of finding out whether one adult educator, who espouses andragogy in scholarship, is congruent and consistent in practice and actually exemplifies andragogy. She triangulated this research through ten data sets and confirmed 'saying and doing' as a clear overlay and just about perfect fit. *The eleven andragogical elements of teacher trust of learners measured were: purposefully communicating to learners that each is uniquely important; expressing confidence that learners will develop the skills they need; trusting learners to know what their own goals, dreams and realities are like; prizing the learners' ability to learn what is needed; feeling learners need to be aware of and communicate their thoughts and feelings; enabling learners to evaluate their own progress in learning; hearing what learners indicate their learning needs are like; engaging learners in clarifying their own aspirations; developing supporting relationships with learners; experiencing unconditional positive regard for learners; and, respecting the dignity and integrity of learners.* The ten data sets used in confirming that this adult educator's scholarship and practice are andragogically congruent were: focus group of students in class regarding anticipated and actual trust; the teacher's perception of his trust in students; course evaluations from Fall, 2009 through Spring, 2012; video recording of the adult educator facilitating 28 clock hours of class time with students; interviews with facilitator's current and past colleagues, some who agree with andragogy and some who disagree; interview of the course facilitator; observations regarding the facilitator's congruence of practice and scholarship; memories and reflections of the researcher on the facilitator.

Henschke (2012a) provides the unique professional preparation he has in both fields for merging counseling and andragogy – the art and science of helping adults learn. Providing general counseling information, he then gives a sketch and time gaps of publication in adult education and counseling. Next, he presents a chronology of publications merging the two fields. In the future trends section, a comprehensive model for counseling in adult education is constructed, including: an andragogical approach, dimensions of maturation, closely connecting counseling and learning, with life tasks, challenges, and dealing with our human values and priorities within human systems of adult life. Examples are articulated of both the professional and learner implementing the model.

Dr. Malcolm Shepherd Knowles popularized andragogy as the theory of adult learning and was referred to as the Father of Adult Education in the United States (US). As his andragogical doctoral students, Han and Henschke (2012) had extensive personal contacts with him. This paper utilizes the method of auto-ethnography to explore how cross-cultural learning and cross-cultural mentoring facilitate transformative learning with the development of intercultural competencies for sojourners when they interact with a significant human being in cross-cultural settings.

Savicevic (2012) gives a broad-brush sweep in addressing a number of current major issues in andragogy research. He declares that research in andragogy cannot be reduced to research techniques. It includes theoretical ground as well. Theory is a research base for understanding. Philosophy is very important for research in andragogy: spiritual values, aims of education and learning, conceptions of an adult person, andragogical ethical reflection on theory and practice. Research in andragogy has its research context. The problem of methodology has been neglected. Research methods and procedures are not separate from philosophical grounds. Contradictions have appeared in andragogy over whether one should create knowledge through research or borrow the knowledge from other sciences. Since andragogy has become a university discipline, the link between teaching and research has been requested by some.

Andragogy has received mixed reviews in the past. Some have analyzed it from a positive perspective. Some have analyzed it from a negative perspective, and some have ignored it altogether. Very little if any effort has been devoted to researching the economic impact of andragogy, especially during this prolonged economic downturn in the USA, in addition to many other countries throughout the world. In this article Henschke (2013a) looks at the theories undergirding his practice of andragogy, eras of the scope of various writings in English concerning andragogy, economic implications of his application of andragogy, and his thoughts about future research trends in andragogy.

Henschke and Isenberg (2012) and Isenberg and Henschke (2013) presented the idea of building an andragogy doctoral program, and doing it andragogically. This actual illustration is of one university that is doing it by presenting various stages of this as the program grows. Doing this has its benefits and pitfalls and these are clearly explained in each paper.

Henschke (2013b) looks at the History, Philosophy and Major Themes of Andragogy that have emerged in his research and practice. He explores those aspects of andragogy within the context of the theme of the conference – Lifelong Learning for All in 2013 – and indicates how the expanding scope of this investigation offers a frame for carrying forward an inspirational concept to the great benefit of lifelong learning constituencies around the globe. He also emphasizes the eleven elements of trust that make this variety of andragogy ‘super.’

Henschke (2013c) provided thoughts on how the conception came about regarding reorienting a Higher Education Institution toward Lifelong Learning (LLL). The background of LLL in ancient times and its emergence in recent times is presented. The researcher’s involvement is described in bringing this about as a concept, and doing the research to flesh-out the specific elements. The research includes: developing a definition of LLL; bringing together the international partners from 19 countries to identify the seven major elements of a LLL Higher Education Institution; engaging two universities from opposite sides of the globe in articulating the 78 measurable performance indicators; and, actively involving a major International University (Chulalongkorn – Bangkok, Thailand) to go through the steps for setting in place and implementing its being a global player on the stage in moving forward that idea for the future of the world in general and the world of lifelong learning – its length, height, depth, and breadth.

Henschke (2013d) focused this study on the extent trust, empathy, and reciprocity in sensitivity may enhance the andragogical foundation of learning, but that insensitivity may destroy andragogical learning altogether. The influence of insensitivity upon the andragogical foundation of learning is striking, especially in its possible negative impact on learning.

Henschke (2013e) asserts that trust has moved well beyond the lofty literature of the abstract discussions into the usable, where the rubber-meets-the-road application and development into practice and technology. Even in a highly unlikely place as a very brutal prison, the implementation of trust throughout helped to radically transform its culture into a very humane place. This is true across the board in many institutions and numerous communities. Clearly, the trend is toward conducting more research in trust and understanding the basic notion of trust as a way to foster its development and implementation across all levels of organizations and communities, throughout society.

Lubin (2013) used an instrument, originally developed by Henschke (1989) for teachers, and modified it for use with coaches measuring the extent to which coaches used the philosophy of andragogy in their practices. Andragogical elements of empathy, trust and accommodating coachee uniqueness were revealed at above average or high above average levels. Of those interviewed, 100% of the coaches reported using the principles and processes of andragogy in their practices. Based on their stories, best practices (88) for engaging andragogy in the practice of coaching were developed.

Reischmann (2013) believes that andragogy is the discipline that deals with the lifelong and life-wide learning and education processes of adults. He usually expresses it with less impressive words: If I had the money that companies and administrations, hospitals and the military throw out of the window right now within a circle of 20 miles because of poor and demotivating personnel management, unnecessary conflicts, incompetence of the workforce, and poor leadership of the managers, I would immediately be a millionaire! My graduates, working in these organizations, for sure reduce this unnecessary cost, and even if they are only successful in 30% of the situations, that is a lot of money. In addition, andragogy is a value to people, who are more happy in their daily work life, and develop a stomach ulcer many years later than most, or never. Our graduates are searched for specialists on the job market. He says andragogues can do this kind of work. We do not talk any longer about some nice cultural entertainment a night per week: We talk about dollars, effectiveness, a humane place in the workplace and community. And not only for individuals, but likewise for society and country: International competition leaves back those national economies that do not invest in educated citizens. And that means investment in adult and continuing education. Competencies are needed so fast (today), that we cannot wait until the children bring these new competencies from school. He identifies four [4] competencies in andragogy that are needed: Teaching, Counselling/Consulting, Planning/Organizing, and Research.

Henschke (2014e) addressed the crucial issue of Andragogy receiving various mixed reviews in the past. Some have analyzed it from a positive perspective. Others have analyze it from a negative perspective, still others have viewed it from a neutral or passive point of view while and some have ignored it altogether. Most of the discussions have limited their observations to how Malcolm S. Knowles addressed andragogy. There has been an inadequate investigation of the foundation and background of andragogy from a world perspective. This research is based on more than 450 major works published in English from national and international sources on andragogy that may help provide a clear and understandable international foundation for the linkage between the research, theory, and practice of andragogy. However, less than 100 documents are referenced in this paper. Six themes have emerged that provide a foundation for the linkage: The evolution of the term; historical antecedents shaping the concept; comparison of American and European understandings; popularizing and sustaining the American and world-wide concept; practical applications; and theory, research, and definition. This is an update for 2014 of this ongoing research.

Henschke (2014c) addresses a curriculum definition, especially as it relates to preparing teachers to be successful in working with adult learners. The main thrust is to clearly articulate some of the major elements needed to help the art and science of helping adults learn idea and practice of that process be as consistent/congruent as feasible. Reciprocity among empathy, trust, and sensitivity are considered to be crucial in the teaching and learning exchange. Competence and experience in andragogy is important even to the extent of selecting and using various techniques and methods in the learning experience, whether used with learners in higher-order thinking or used with lower-level learners. Techniques the author has found helpful are mixing a lecture with discussion of questions raised by learners in response to content of the lecture; encouraging and giving learners opportunity to take more responsibility for their learning, thus becoming more self-directed; varying one's approach for accommodating different learning styles each learner possesses; looking at a perspective of learning in various areas/pillars of life – being, knowing, doing, living together, changing, and developing sustainability. A true story is provided illustrating a principle of andragogy – doing in practice the same thing one believes and says.

Henschke (2014d) posited a definition of lifelong learning as a master andragogical principle/concept regarded as the continuous and never complete development, changes, and adaptation in human consciousness in an ever increasing number of situations. This paper provides thoughts on how this international conception came about and moved forward regarding reorienting Higher Education Institutions toward Lifelong Learning (LLL). The background of LLL in ancient times and its emergence in recent times is presented. His involvement is described in bringing this about as a concept, and doing the research to flesh-out the specific elements of LLL. This research includes: Developing a definition of LLL; bringing together the international partners from 19 countries to identify the seven major elements of a LLL Higher Education Institution; engaging two universities from opposite sides of the globe in articulating and listing the 78 measurable performance indicators [MPI] for LLL; bringing together participants for discussing the MPI from 13 nations at an International Lifelong Learning Conference; and, actively involving a major International University (Chulalongkorn – Bangkok, Thailand) to go through the steps for setting in place and implementing its being a global player on the stage in moving forward that idea for the future of the world in general and the world of lifelong learning [LLL] – its length, height, depth, and breadth.

Lu (2014) addressed the issue that in higher education, teaching effectiveness in the classroom is a guarantee to improve the quality of education. However, teaching effectiveness comes from the personal motivation, perception and satisfaction in the teachers' jobs. The merit incentive payment system is directly linked to teachers' motivation and perception, which also directly or indirectly results in satisfactions with the teachers' career and students learning in the classroom. This study investigates the relationships between teachers' payment, teacher's/student's satisfaction, and teacher's performance evaluated from an instructional perspective and certain factors such as ages, gender, degrees etc. in relation to teacher/student motivations and perceptions. Study participants were students and teachers both working and enrolled in four different higher education systems from 2012 to 2014 semesters in Nanjing, The Peoples' Republic of China. Henschke's (1989) Modified Instructional Perspectives Inventory (MIPI) [an andragogical measurement inventory] had been used in various situations to evaluate teacher performance in the class from instructional perspectives. The MIPI includes seven factors: *Factor 1: Teacher Empathy with Students, Factor 2: Teacher Trust of Students, Factor 3: Planning and Delivery of Instruction, Factor 4: Accommodating student Uniqueness, Factor 5: Teacher Insensitivity toward students, Factor 6: Experience-based Learning Techniques (Learner-centered Learning Process), and Factor 7: Teacher-centered Learning Process.* The MIPI-s, an adaptation of the MIPI, will be used to evaluate student's teacher performance in class from an instructional perspective. Students and teachers reported satisfaction with learning and teaching using a *Likert-type scale* is based on a demographic questionnaire. This study utilized a quantitative approach with standard multiple regression analysis and ANOVA. There were three dependent variables: teacher annual incomes, teacher satisfaction and student satisfaction. The independent variables included some covariates in relation to teacher motivations and perceptions and seven factors of MIPI and MIPI-S with 45-item respectively. The results of the regression analysis and ANOVA demonstrate significant relationships between teacher annual incomes and seven factors of MIPI/MIPI-S, and teacher's/student's satisfaction with teaching/learning as well. The sample contains 457 teachers and 9,017 students. The data had been collected via online questionnaires.

Henschke (2014b) provided a personal perspective and description of his learning experience on living a long, healthy life. It is my story on this topic and includes the following sections: An introduction, healthy life descriptions according to various age categories; a healthy long life depicted in relationship to various human values and human systems; dimensions of maturing for healthy, long lives; for seekers of self-actualization reaching toward a long healthy life; his more personal side of this story in experiencing a long healthy life of 82 years thus far; a disclaimer on the reader being free to choose or not choose some of his guidance processes; how he came into adult education; numerous Bible instructions guiding and helping him learn in his long, healthy life to date; a source of influence – an idea that takes hold on a person; andragogy took hold of him and eight central elements of this; additional promises from God enhancing his healthy and lengthy life; a view by some other person than Henschke – Lori Risley; and, a conclusion to this matter from his point of view on tools, trends, and methodologies in adult and community health education.

Charungkaittikul and Henschke (2014) set forth the andragogical idea that today's world may be characterized as the dawn of the new millennium of the learning society where knowledge is considered as a country's most valued asset and primary source of power. In the increasingly intense competition among the international communities, Thailand has been respected as advancing the andragogical approach to transforming communities, cities and regions into learning societies engaged in a sustainable development strategy that promotes the continual learning of individuals – the smallest unit of society. It emphasizes balance among the economy, society, natural resources and environment; and, is transforming the Thai people into knowledge citizens and knowledge workers. These carry stipulations concerning lifelong learning, educational enhancement and global competitiveness aimed toward developing appropriate manpower to move the society toward sustainable happiness as compared and contrasted with maintaining the 'status quo.' This article aims to identify the current situation of lifelong learning and education in Thailand; analyze and synthesize the five best learning society case studies; and, propose guidelines for developing a sustainable lifelong learning society.

Henschke (2014a) designed this article to address: the introduction of lifelong learning from ancient times; dimensions of maturation as guides for lifelong learning; considering the andragogical approach in early, adult, and lifelong learning; counseling adult learners contributes added dimensions to facilitating lifelong learning; assessing life's challenges within the decades of lifelong learning, core values, and human systems; 1997 – CONFINTEA V – Hamburg, Germany – lifelong learning emphasis only on older adults; 2009 – CONFINTEA VI – Belem, Para, Brazil – lifelong learning emphasis being throughout life; prominent role of higher education institutions changing toward lifelong learning; developing definitions of lifelong learning and learning in general; characteristic elements of lifelong learning higher education institutions; implementing challenges of lifelong learning, core values and human systems; and, two appendices including beneficial instruments for use in lifelong learning.

On the Cutting Edge of Additional Developments 2015 and Beyond into the Future

Henschke (2015) declared that trust, empathy, and sensitivity enacted, combined and expressed reciprocally toward learners/supervisees and fostering in them the same toward facilitators/supervisors, begins with their extending the "benefit of the doubt" to learners/supervisees in the workplace. Reciprocity on a daily basis means: Interrelatedness, mutual assistance, give and take, aiding and abetting, mutuality, interplay, learning, cooperation, and collaboration, that most especially becomes operational in the workplace. Trust, empathy and sensitivity in reciprocity are central components to developing classrooms or workplaces ripe for fostering learning, producing job satisfaction, and providing an atmosphere and environment conducive for fostering and enhancing supervisees' desire to retain their employment with the corporation -- thus reducing costs of employing new workers/supervisees. Developing relationships that nurture learners/supervisees *and* learning in the workplace is of significant importance to workplace learning. Learning at its best is built on trust, empathy, sensitivity and reciprocal relationships through practices in the workplace. Through the use of what I call "A Living Lecture," participants and the facilitator share in identifying a number of elements of trust, empathy, and sensitivity with reciprocation, and minimizing insensitivity in the learning process, as well as uses of the same "in practice"; and, will utilize the process of raising questions for clarification, rebuttal, elaboration and practical application. In this way, learners have the opportunity to discuss, debate, and construct a usable framework of trust, empathy, reciprocation and sensitivity through the lens of their own experiences that can strengthen learning in their own learning and work environments.

Grosso (2015) addressed the sub question: "which andragogical and gerontological adult learning needs must be met for aging adults with DD to successfully age in place?" as following:

Andragogical Learning Needs	**Gerontological Learning Needs**
- Engage, protect, teach/help learn - Promote respect	- How to prepare for and address age-related challenges faced by the general population
- Create a climate conductive to learning (physically and psychologically) – have fun! - Promote identity in retirement	- How to deal with health problems that have a higher prevalence in older adults with DD (e.g., vision and hearing concerns, obesity, diabetes, and cardiovascular disease)
- Collaboration	- How to manage weight by eating healthy and exercising regularly is essential for

- Develop friendships/social ties	those striving to successfully age in place
- Individualize learning	- How to tackle myriad social age-related learning challenges (e.g., coping with an accumulation of loss, grief, isolation, and barriers to resource utilization)
- Modeling	
- Repetition	

Nukic (2015) completed his study as an andragogical exploration of how formal and non-formal adult English as second language programs helped non-English speaking adults learn English as a second language in the United States. He wanted to find out what ESL programs did to help adult students learn English. He explored 10 ESL programs through secondary interview data and primary data provided by focus groups and observations. He used axial coding to determine if Billington's (1988) seven characteristics were present in ESL programs, and he determined that most of the programs did include the seven characteristics which are: *A class environment of respect; their abilities and life achievements acknowledged; intellectual freedom, self-directed learning, experimentation and creativity encouraged; learner treated fairly and as an intelligent adult; class is an intellectual challenge; interaction promoted with instructor and between students; and, regular feedback from instructor.* However, none used all seven consistently. Based on open coding, eight themes emerged: goals, resources, qualifications, curriculum, environment, teaching strategies, learning, and obstacles. Throughout the ESL teacher interviews, focus groups, and observations, these themes emerged as the most important characteristics ESL programs used or needed in order to help non-English speaking adults learn English. All 10 ESL programs had a common goal – help adult ESL learners learn English. However, not all ESL programs helped non-English speaking adults in the same way.

Nukic further emphasized how each program helped students varied in students' and program's goals - most ESL programs helped non-English speaking adults learn English by having a goal that aligned with students' individual goals. The resources commonly used were a large amount of classes offered in easily accessible locations. With regard to teachers' qualifications - most ESL programs had qualified individuals (minimum master's degree in teaching) teach ESL courses. With regard to curriculum - the curriculum was recommended to be adjusted to what students wanted and needed to learn. In consideration of environment – the classroom environment should be welcoming and open for students to feel non-threatened. For teaching strategies, most programs recommended participation as the main approach for helping students learn, and for learning – most of the data represented indicated that student engagement and self-directness was the most important factor in students' abilities to learn. And, with regard to obstacles – most programs indicated that attendance and diversity were the largest obstacles in students' learning.

Pagano (2015) likens the andragogy of nature as man being like a tree. There is the root system of personal values, made up of: respect, passion, determination, enthusiasm, awareness, responsibility, listening, integrity, creativity, courage, and trust. There is the conductor system [or trunk] which is the torso-person system seen as a bio-psycho-social being. This torso-person is made up of six concentric rings: the need to know, motivation, orientation towards learning, willingness to learn, the role of experience, and self-concept. The foliage system is the V.I.T.A. – the [*volonta*] will, imagination, tolerance and action. This is comprised of the umbrella – will to meaning and is composed of: family of origin, health/physical shape, partner or stepfamily, personal growth (spiritual dimension), hobbies/passions, friends, money/finances, and work/career. This is quite a metaphor that could be developed into a comprehensive perception of the dynamic, living, human being.

Giampaolo (2015) studied the idea that creation of a personalized learning path has been proposed to students attending six courses of two graduate degree programs at the University of Padua in Italy. The personalized learning plan concluded between teacher and students allowed to define objectives, strategies, resources and evidence that have been assessed. The practice of the personalized plan saw the teacher become a resource for students, a facilitator of learning. The realization of these plans allowed developing an experiential reflection on practice to better understand how academics could respond to the needs of personalization for students and, specifically, how the learning contracts could help faculty members to draw guidelines to personalize learning. The idea of personalized learning reflects many of the earmarks or process elements of Knowles (1995) take on andragogy, such as: (a) prepare the learner to the learning program, (b) create a climate conducive to learning psychological and physical, (c) involve the learner in a mutual planning, (d) engage the learner in diagnosing their learning needs, (e) engage the learner in the formulation of the learning objectives (f) involving learners in designing learning plans, (g) help learners to complete their learning plan, (h) engage the learner in the assessment of learning outcomes.

When Ramnarayan and Hande (2015) addressed using Self-Directed Learning in conducting educational experiences in the Johns Hopkins Medical Schools they used the Theoretical Framework of the andragogical process elements outlined by Knowles (1970), Setting a climate conducive to adult learning, establishing a structure of mutual participative planning, diagnosing the needs of adult learners, setting the learning objectives for adult learners, designing a plan to carry out the learning, conducting the pattern of learning experiences, and evaluating the learning experiences by the learners.

Keefe (2015) said that in the field of adult education, one of the better known concepts is that of the Six Assumptions of Malcolm Knowles. These assumptions, according to Knowles, divide the world of pedagogy, defined as the art and science of teaching children, from that of andragogy, conceived as the art and science of helping adults learn. In the realm of education for older learners, myriad schools and programs dot the educational landscape, but one particularly unorthodox institution of adult education, the Highlander Folk School, led by activist educator Myles Horton, stands out for its teaching roles in the Union Labor Movement of the 1930s and 1940s, and the Civil Rights Movement of the 1950s and 1960s. This paper looks at Myles Horton of the Highlander Folk School, his background, education and preparation for establishing his lifelong dream of using alternative education among the "common uncommon people" for learning how to solve social and economic justice problems, and this paper then focuses on the extent to which the philosophy and teaching actions of Horton correspond to the Six Assumption Framework of andragogy as delineated by Malcolm Knowles.

Conclusions on the History and Philosophy of Andragogy

This is a History and Philosophy of Andragogy around the world, based on numerous English language documents. Eight new documents are included in the 2015 iteration of this andragogical research. There are a total of nearly 500 English Language documents identified for the broad research on andragogy through 16 major eras. Only a fraction of these documents are included in this work. Two Hundred more are waiting to be included in further iterations of this research. Nonetheless, andragogy is not just the work of one or a few persons, but is the result of efforts by multiple people from numerous nations around the globe. The reader is invited to join that effort. Please contact the author at the e-mail address provided on the bottom of the first page of this article.

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YES I NEED HELP! A DAY IN THE JOURNEY OF ADULT LEARNERS PURSUING HIGHER EDUCATION: A CARIBBEAN PERSPECTIVE

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ABSTRACT: Within more recent years, there has been a gravitation of non-traditional adult learners to higher education. Despite the motivational factors associated with this decision, it is evident that compared to the traditional learner, the non-traditional learner journey in higher education is equipped with numerous barriers. Such barriers can hinder or delay the process of completing higher education. On this premise, it is crucial that adequate support systems are not only identified but utilized while pursuing higher education. This qualitative study explored the perceived barriers of 100 non-traditional adults who pursued or attempted to pursue higher education and the support systems needed for them to be successful. The major themes that emerged as influential barriers were (a) financial, (b) family, (c) work, (d) time management, (e) psychosocial and (f) institutional. Regarding support systems needed to ensure success, the major themes that emerged were: (a) family, (b) spirituality, (c) friends, and (d) work. This study has practical implications for the adult learner, adult educator and higher education institution.

Keywords: Adult learners, Higher Education, Determination, Caribbean

Within the field of higher education, there has evidently been an escalation of adult learners returning to the classroom (Ross-Gordon, 2011) despite the countless barriers encountered while pursuing their academic quest (De Vito, 2010; Rubenson & Desjardins, 2009; Russell, 2006; Villarruel, Canales, & Torres, 2001). These motivated adult learners, despite such barriers, are yet fueled--whether intrinsically or extrinsically--to pursue higher education.

The appeal to establish perceived motivation and support for adults pursuing higher education is not new to the field of adult education. Original work of Cross (1978); Cross and Zusman (1977) were the underpinning for many scholars in adult education. Since the original discussion, there has been much contribution regarding motivation in more recent years. Bowl (2001) identified several factors that motivate the adult learner to pursue higher education, which included a combination of economic necessities due to unemployment, career change or promotion. Despite the motivational factor, it is evident that adult learners would encounter some barriers. Weil (1989) affirmed adults entering higher education can experience shock, and a sense of personal powerlessness. Additionally, many adult learners encounter the struggle for personal, academic, financial and emotional survival. As a result, many adult learners are afraid to return to higher

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education due to fear of failing, instability, barriers associated with pursuing higher education and inadequate support systems. In an attempt to conquer such barriers, it is evident that effective support systems are needed for adult learners while pursuing higher education to be successful. Such support systems can mirror kinship, family, financial and positive attitudes about the value of schools, all of which can assist adult learners while pursuing higher education (Kenny, Blustein, Chaves, Grossman, & Gallagher, 2003).

Study Purpose and Significance

The purpose of this study was two-fold. First it was intended to identify barriers that inhibit adult learners from pursuing or attempting to pursue higher education in the Bahamas. Second, it was intended to identify possible support systems adult learners identified as being instrumental while pursuing higher education. This study is significant because it provides insight into the adult learner regarding potential barriers that may be encountered while pursuing higher education, yet highlighting some support systems that are crucial for success. The information gleaned from this study is also critical for higher education institutions when designing and developing programs specifically for adult learners.

The theoretical framework that acts as a foundational platform for this study is The Self-Determination Theory (Deci & Ryan, 1985). The research questions that guided this study are:

1. What are adult learners' perceptions of barriers that influence their attainment of higher education?
2. What are adult learners' perceptions of support systems needed to ensure success while pursuing higher education?

Literature Review

The Adult Learner

There is much variation when defining the adult or non-traditional learner in higher education. Non-traditional adult learners are customarily defined as individuals over the age of 21 entering higher educational institutions for the first time. However, some higher educational institutions consider 25 years and older as non-traditional adult learners (Bowl, 2001; Ross-Gordon, 2011; Weil, 1986.) Knowles (1980) identified adult learners as autonomous and self-directing. They pursue areas of interest to them. They accumulated a wealth of life experience and knowledge that may include work-related activities, family responsibilities and previous education. Adults are relevancy-oriented, and they must see a reason for learning something. Therefore, many adult learners who return to the classroom do so to either gain additional qualifications for job opportunities, career advancement or job promotion, so they can ultimately increase their financial income (Rothes, Lemos & Goncalves, 2014).

Adult learners exhibit multiple characteristics. They manage a variety of social roles while pursuing higher education. Being a worker, spouse, or partner, parent and actively involved in community activities are a few examples. However, these many roles pose challenges for adult students to contribute time for academic study/work and involvement in college life (Ross-Gordon, 2011).

Motivation of the Adult Learner

Adult learners are motivated to pursue higher education for a number of reasons such as to secure additional qualifications for opportunities for employment, or promotions which ultimately lead to financial gain (Rothes et al., 2014; Teowkul et al., 2009). It is imperative for higher educational institutions to understand the motives, beliefs and goals of adult learners to be able to promote enrollment, persistence and successful completion of courses (Rothes et al., 2014). Teowkul et al. (2009), defined motivation "as people's needs and desires that influence their behaviors" (p. 27). Their study showed that the motivation for pursuing graduate studies for 321 Thai master and doctoral degree students studying at a large state university in Thailand were for self-development, career enhancement, career change and environmental factors. The achievement, recognition and growth, self-confidence and respect from others help with the self-development. Career enhancement is obtaining professional credentials needed for advancement, which also improves one's income, financial stability, better benefits and so forth. Career change allows transition from one career path to another or changes from one area of specialty to another. Environmental factors relate to esteem and belonging; esteem from others, love, affection and being a part of a group or organization (Teowkul et al., 2009). Ultimately, adult learners are motivated to pursue higher education for a number of reasons, economic or rational motivation being the most common.

Barriers to the Adult Learner

Adults have many responsibilities that they must balance against the demands of learning. Due to these responsibilities, adults have barriers against participating in learning. Some of these barriers include lack of time, money, confidence, interest, lack of information about opportunities to learn, scheduling problems, and problems with child care and transportation (Lieb, 1991). Within the last decade, there has been much discussion in the literature regarding barriers that influence adult learners pursuing higher education distance and e-learning (De Vito, 2009; McGivney, 2004; Morris, Finnegan, & Sz-Shyan, 2005; Muilenburg & Berge, 2005) institutional (Falasca, 2011) or ethnicity (Villarruel, Canales, & Torres, 2001). The common theme that emerged, is adult learners compared to the traditional learner are confronted with a myriad of barriers.

The new phenomenon of online instructional learning has been growing rapidly for many years. Numerous researches have also shown there were no significant differences in students' performances among online learning and face-to-face learning (Arbaugh, 2000; Johnson, Aragon, & Shaik, 2000; Neuhauser, 2002; Nichols, Shaffer, & Shockey, 2003).

However, four barriers identified were social interaction, administrative/instructor issues, learner motivation and time/support for studies (Muilenburg & Berge, 2005).

Villarruel, Canales & Torres (2001) in their study on barriers experienced by Hispanic nurses revealed the more frequent barriers as financial, institutional, perceived discrimination by faculty and peers and cultural values such as family and gender roles. Within this study, it was also revealed that some barriers were equally viewed as bridges in higher education. McGivney (2004), whose focus was persistence in adult learning, revealed similar barriers of adults not completing higher education. Such barriers included personal factors, open and distance learners, gender differences, lack of family or partner support, financial, course related and institutional-related factors, inadequate pre-course information and guidance, perfunctory interviews, managing study time, institutions that are not 'adult friendly' and lack of support. Despite these barriers, research has shown that adult learners of any age can learn and succeed in their pursuits if they are afforded the opportunity, assistance, and support they need.

Support Systems

Although there is limited research on support systems for adults pursuing higher education, a number of support systems are paramount for adult learners to overcome barriers that inhibit academic success. Counseling support services (individual and group), cultural support services (parents, spouse, siblings, close friends), and systemic support (student-centered services) were identifiable supports to help adult learners overcome barriers and obstacles while pursuing higher education (Gary, Kling, & Dodd., 2004).

Counseling support services include individual and groups counseling services offered on campus or within the community. Individual counseling services help encourage and assist learners to overcome the barriers of anxieties and other emotional issues that the adult learner may experience while pursuing higher education. The group counseling services can assist support groups that emphasize effective transition adjustment to academic life and help learners to become cognizant of the expectations of higher education. Additionally, participants in the group counseling can meet others with similar concerns, where they realize other learners struggle too, and can support each other who share similar thoughts, feelings, anxieties, and emotional reactions (Gary et al., 2004).

The cultural support services which consist of relatives, partners, and close friends also aid in the academic success of the adult learner while pursuing higher education. Adult learners can feel empowered and less guilty about not spending time with family and friends if they receive support from family and friends. Furthermore, kinship support, family support and positive attitudes about the value of schools are a few findings that help young adults while pursuing their secondary education (Kenny et al., 2003). These kinds of supports were also found to be the case with adult learners while pursuing higher education. Having a strong support system from family members, and individual motivation help make adult learners' educational journey more meaningful and successful (Gary et al., 2004). Additionally, institutions that give information and/or spiritual support also help adult learners while pursuing higher education.

Systemic support which is at the institutional level includes student-centered services. The cooperation between counselors and staff in several campus departments with academic support services (e.g., tutoring), new student services (orientation programs, and child care services) would greatly impact the academic success of adult learners.

Method

Study Design, Data Collection, and Analysis

A qualitative design was employed in this study and was reflective of structured interviews. Approximately 100 in-depth interviews were conducted over a period of seven months. Participants were selected for this study utilizing convenience sampling. This sampling technique was utilized, because of feasibility and access to the participants (Andrews & Frankel 2010). The inclusion criteria for participants were: participants must have been 25 years or older, all genders, must have completed high school or have attempted to complete some higher education courses. Participants were informed of their rights not to participate in this study.

Data were qualitatively analyzed through open coding to establish themes and main concepts coding (Miles & Huberman, 1994; Strauss & Corbin 2008). Recurring topics in the text were recognized as themes and sub-themes utilizing the research structure provided by the research objectives, research questions and the theoretical framework. This process allowed a deeper understanding and explanation of issues that were being studied. To ensure greater validity and reliability, a peer reviewer read through the data to ensure themes and categories corresponded with the research questions.

Participants' Demographic Profile

There were a total of 100 participants in this study, local residents from The Bahamas, which consisted of 26 males and 74 females. The participants' age range varied from 25 to 51+ years. The educational level of the participants was reflective of participants who completed high school education and some college (*n*=20) to those who completed higher education (*n*=79). Employment status of participants varied. See Table 1 for Participants' Demographic Profile.

Findings

Research Question 1
What are adult learners' perceptions of barriers that influence their attainment of higher education?

The results from this study confirmed that non-traditional adult learners encounter numerous barriers while pursuing or attempting to pursue higher education. Participants were specifically asked in order of priority, what were the major influential barriers that prevented or influenced them while pursuing higher education. The major themes that emerged as influential barriers were (a) financial, (b) family, (c) work, (d) time management, (e) psychosocial and (f) institutional.

Financial

It was revealed that approximately 85% of the participants indicated that finance or the lack thereof was an inhibitor or influenced participants obtaining higher education. Some excerpts that represented the sentiments of the participants' financial concerns were:

> Because I had to struggle with funding, it became a hassle to make payments for tuition and I really wished I was able to receive a scholarship or qualify for some other assistance. I have yet to return [to higher education] after two years but I am saving funds to go back.

Table 1

Participants' Demographic Information

Variable	***n***	***%***
Gender		
Male	26	26
Female	74	74
Age Range		
25-30	39	39
31-35	27	27
36-40	20	20
41-45	7	7
46-50	4	4
51 and over	3	3
Marital Status		
Married	30	30
Single	54	54
Divorced	2	2
In relationship	9	9
Separated	4	4
Widow	1	1
Children		
Yes	64	64
No	46	46
Educational Level		
High School/Some College	20	20
Associates	29	29
Bachelors	37	37
Masters	3	3
Doctorate	3	3
Professional Certifications	6	6
Other	1	1
Employment Status		
Unemployed	19	19
Part-Time	7	7
Full-Time	74	74

Note. **N=100**

One participant, despite the constraints of finances, stated, "…lack of finances, I borrowed, begged and sacrificed to complete higher education." Meanwhile, other participants were compelled to undertake a second job. A married male doctoral student stated, "… I did some overtime to earn sufficient funds that were needed to obtain my degree." The sentiments of the other participants were that they had to manage their finances very carefully to ensure they could pay their tuition while other participants had to resort to student loans or social services for financial support.

Family

Approximately 48% of the participants identified a number of barriers associated with family as a crucial factor that hindered them from pursuing or obtaining higher education. The theme, family, included sub-themes: family commitment, childcare and responsibilities, lack of family support, and barriers associated with spouses and/or significant others. Some excerpts that echoed the experiences of the participants were: "Having to deal with my daughter full time and go to school full time was a challenge because family time is important. I had to help with homework, projects etc. along with my class work." A married male with two children explained, "It takes a lot of time, money and sacrifice of raising a family along with attending school. It's difficult balancing both." Another female participant explained, "Family obligations caused me to be reluctant to pursue higher education. I felt as if I was abandoning my younger children." It was also the sentiments of the participants that death, sickness and spousal separation and/or divorce also had a negative impact on the non-traditional learner pursuing higher education

Work

Approximately 35 % of the participants concluded that barriers associated with work influenced their obtaining or pursuing higher education. When asked specifically how work influenced the attainment of higher education, some participants explained, it was extremely difficult balancing work scheduled with class schedule, likewise balancing work assignments with school assignments. Further, in some instances it was difficult obtaining study leave, flexible work hours or employee rotation to attend classes. This situation resulted in participants either missing classes, taking a reduced course load which resulted in an extension within their respective programs or having to quit schooling. One participant indicated that because of her work commitment, the attainment of her Bachelor's degree, which was scheduled for four years, took her 15 years.

Time Management

Approximately 34% of the participants indicated that barriers associated with time management were obstacles to their obtaining or pursing higher education. Most participants said the art of balancing time was a skill difficult to acquire. Most adult learners because of their respective social roles, family and work commitment found it extremely difficult to manage their time while pursuing higher education. The lack of time management had a significant impact on assignment completion, grades, project meetings all directly associated with higher education. It was evident when participants were faced with the challenge of higher education compared to family and work commitment in most instances family and work commitment outweighed the desire for higher education.

Institutional

Approximately 34% of participants identified institutional barriers within the respective institution they were obtaining higher education as a barrier to obtaining or pursuing higher education. Institutional barriers included: registration and advisement process, course availability, course time, and overall institutional bureaucracy pertaining to non-traditional adult learners. Some concerns expressed by the participants were that the infrequency and inconsistency of courses offered was a challenge to complete higher education. One participant went to the extent of saying “Trying to get the classes I need for each semester is a test…classes are only being offered at specific times.” Furthermore, it was difficult for the adult learner who is employed full time with family responsibilities to take time off from work to stand in lines for course registration and to physically meet with academic advisors.

Psychosocial

Approximately 31% of the participants indicated that psychosocial barriers impacted their pursuing or obtaining higher education. Psychosocial barriers, in this instance, extended to include mental, emotional, physical, social and environmental factors. A number of the participants expressed concerns regarding the "emotional roller coaster" while obtaining higher education. One participant stated, “It seems stress and depression are quite normal for college and graduate students."   Discouragement and lack of motivation were also apparent. Barriers associated with part-time enrolment was a general concern because students who were fully enrolled completed higher education quicker. Also, some adult learners that began the program when they did "dropped out" because of various barriers. This situation resulted in many students feeling discouraged and unmotivated. Additionally, many students expressed concerns that they have lost their former social life. The number of previous friends with whom they socialized diminished and were replaced with classmates whose focal point was class assignments.

Research Question 2

What are adult learners' perceptions of support systems needed to ensure success while pursuing higher education?

The results from the data revealed that support systems are needed to ensure the success of adult learners while pursuing higher education. The major themes that emerged were (a) family, (b) spirituality, (c) friends, and (d) work. Conversely, the data revealed that family and friends were identified as barriers that negatively impacted adult learners pursing higher education. However, they were also identified as support systems needed to ensure the success of adult learners while pursing higher education.

Family

The major theme that emerged as a crucial support system needed by adult learners pursuing higher education was family. Approximately 97% (*n* = 97) of the participants concurred with this support system. Family in this study included parents, spouses or significant other, siblings and extended family members. Most participants indicated that continuous encouragement, motivation, and financial assistance were needed by adult learners during their journey in higher education.

One participant explained the importance of family as a support system. She stated, "Family give[s] support and financial assistance…they also encouraged me during difficult times in school." Family also served as a motivational factor for adults pursuing higher education. A single mother explained, "I am no longer just doing things [pursuing higher education] for me but also my child. Knowing this causes me to hold on to my dream of finishing school and even pressing harder to obtain a new job." A male participant explained the importance of support from a spouse while pursing higher education. He believes that spousal support is crucial and impacts the adult learner tremendously. He stated,

> My girlfriend is just amazing. When I have a problem [while pursing higher education] she is always there to support me mentally, physically as well as emotionally. The first thing she will do is pray for the wisdom, knowledge and understanding. It's hard to explain but once I have her support, my mentality is automatically programmed to persevere and pursues greatness in school.

Spirituality

The second theme that emerged was spirituality. Approximately 53% (*n* =53) of participants revealed that spirituality as a support system was crucial while pursing higher education. Spirituality in this instance included faith in God and prayers (individual and collective). Many of the participants were of the belief that they would not have been successful while pursuing higher education if it were not for their faith. Female participants authenticated this belief and stated, "My faith and spirituality was strengthening during this journey [pursuance of higher education]." Another participant stated, "I prayed for guidance and focus. I also believed and trusted in God throughout my walk in college. I knew He would be a provider and develop my mind." Other participants explained the importance of spiritual support from priests, pastors, and church members during their endeavor to pursue higher education via prayers, and fasting and prayers.

Friends

The third theme that emerged was friends. Approximately 33% (*n* = 33) of participants revealed that friends were a support system that was instrumental while pursuing higher education. Friends included both individuals that were enrolled in their respective programs and those who were not. Friends evidently served as a source of motivation to the participants during difficult times while pursing higher education, in particular when participants were at the point of giving up. One participant stated, "My friends continued to push me to pass class and get good grades." Friends were also instrumental within respective courses when the participants may have missed classes, assignments and needed support from peer during challenging times during their respective programs.

Work

The final theme of significance that emerged was work. Within this study, 74% (*n* = 74) of the participants were employed whether part-time or full time with financial obligations to self and/or family. Approximately 18% (*n* = 18) of the participants revealed that work as a support system is critical to the adult learner while pursuing higher education. The theme work included sub-themes of co-workers, administration and institution each of which had a significant but distinct roles as a support system. Many of the participants revealed that it was imperative that they received at level of support from co-workers and administration while pursuing higher education. This support was defined as encouraging words during difficult times, motivation or flexibility with work schedules and assignments. From an institutional perspective, some participants revealed that their respective workplaces provided financial assistance to help them complete higher education. Further, their institutions had policies and procedures that support employees desirous of pursuing higher education.

Discussion

Implication for Practice

The endeavor to pursue higher education by an adult learner is commendable.. However, the decision to pursue higher education should not be an individual decision but should require contributions from family, spouses and significant others who would all be impacted by the adult learner's decision to pursue higher education. Unlike the traditional adult learner, who would transition to higher education immediately after high school, approximately 18 years or early 20's and not encumbered with the constraints of life, the non-traditional adult learner does not have this luxury. On this premise, it is strongly encouraged that adult learners properly plan for the journey of higher education taking into account possible barriers, opportunities, and strategies to ensure success.

It is paramount that the nontraditional learner does not only examine self, but is cognizant of the types of higher education institution that would be a best fit; understand the institutional accommodations, policies and procedures with regard to the adult learner. Additional factors that should be considered by the adult learner from an institutional perspective are: mode of delivery of courses, enrollment requirements, availability of financial aid, and support systems for the adult learner and course requirement with the thought of work/school balance as an underpinning.

More than 30% of students can be classified as adult learners within higher education. Therefore, from an institutional perspective, it is crucial that proper provisions, policies and procedures should be reflected to accommodate the adult learner. Likewise, it is paramount that there are proper support systems necessary to ensure the success of the adult learner. Such support systems may include financial aid, adult learning centers, and credit for experience, counseling/advisement personnel and a mentoring program.

Lastly, it is imperative that adult educators understand the concept of "the adult learner," characteristics of the adult learner, barriers associated with the adult learner, and support systems needed by the adult learner in comparison to the traditional learner. It is paramount that adult educators are cognizant of the principles of adult learning and utilize it as a theoretical framework for all classes, assignments, and assessments. As it relates to the adult educator and the adult learner, educators must learn why their students are enrolled (the motivators) and determine what is keeping them from learning. Furthermore, adult educators must plan their motivating strategies. An effective strategy involves showing adult learners the relationship between training and an expected end (Lieb, 1991).

Positive reinforcement by the adult educator can improve learning, as can proper timing of the instruction. Learning results from stimulation of the senses. Students learn differently and have different learning styles. Adult educators should incorporate different methods to ensure all of the learning styles are being stimulated to increase optimal teaching success.

Additionally, the learners come to the course with precisely defined expectations. Unfortunately, there are barriers to their learning. The best motivators for adult learners are interest and selfish benefit. If they can be shown that the course benefits them practically, they will perform better, and the benefits will be longer lasting (Lieb, 1991).

Conclusion

The results from this study contribute greatly to the field of adult education, higher education and workforce education. It provides awareness of some barriers adult learners encounter while pursuing higher education. Additionally, it provides insight on perceived support systems to ensure the success of the adult learner while pursuing higher education. The findings gleaned from this study are consistent with the literature within the fields of adult education and higher education regarding barriers the adult learner encounters while pursuing higher education. Furthermore, the support systems referenced provide practical guidance to the adult learner pursuing higher education.

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BECOMING A LIFELONG LEARNING CITY: LESSONS FROM A PROVINCIAL CITY IN SOUTH KOREA

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ABSTRACT: This paper is designed to explore Jeonju City's strategies to build a successful lifelong learning city by analyzing the practices for the Lifelong Learning City Movement (LLCM) and then draw the limitations and needed tasks for building a Lifelong Learning City at the local government level. As Cunningham (1993) pointed out, we found some gaps between the ideal and the reality for Jeonju LLCM. Accordingly, in order to promote LLCM at the local government level successfully, the city/county should give residents autonomous rights to solve community problems with their collective efforts. It should make full use of the local resident autonomous facilities and organizations in fostering lifelong learning. It needs to place lifelong educators who plan local lifelong education projects at lifelong learning centers and institutions, offer various lifelong education programs to the citizens, and hold various lifelong education events at lifelong education institutions. In sum, Jeonju City's LLCM should provide learning opportunities for adult learners by strengthening administrative organizational structures with regard to citizen education, and allow residents to play an important role in building local learning communities by voluntarily organizing study groups under the support of the city.

Keywords: Lifelong Learning City, Lifelong Learning Circle, Vitalizing Local Economy, Regional Human Resource Development, Social Integration

Background and Purpose

According to much of the literature on lifelong learning, constructing a learning society with an emphasis on citizenship, human rights, and human resource development are crucial to meeting the challenges of the 21st Century (Field, 2003; Jarvis, 2006; OECD, 2001; UNESCO, 2015). The establishment of a lifelong learning city would, according to its original intent, contribute to developing regional human resources, expanding learning opportunities of the residents, forming a regional community through small, organized learning study circles, and thus forming a society of democratic citizens (IAEC, 2015).

The European Lifelong Learning Initiative sees the lifelong learning city as a learning community and defines it as "a city, town or region that mobilizes all regional resources to abundantly develop the citizens' potentiality for prosperity, maintenance of a unified society, and to promote personal advancement "(Longworth, 1999, p. 109). The Lifelong Learning City Movement (after here LLCM) in South Korea is one of the regional units of lifelong education organized as a "learning town," "learning region," or "learning community" (Kim, 2004, p. 5).

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Since the Organization for Economic Cooperation and Development (OECD) funded a project to create ‘educating cities’ in the 1970’s (Longworth, 2006), the idea of creating Lifelong Learning Cities has expanded throughout the world. Japan, for example, named Kakegawa as its first Lifelong Learning City (after here LLC) in 1979. Since then Japan has named 140 cities Lifelong Learning Cities. The United Kingdom created a Learning City Network (LCN) by proclaiming 80 cities Lifelong Learning Cities (Longworth, 2006). According to the International Association of Educating Cities (after here IAEC), 487 cities in 37 countries have organized and are taking part in the IAEC (IAEC, 2015). The LLC movement of South Korea has been widely popularized, primarily based on a government-centered approach. By 2015, 136 of 226 cities, counties, and districts have been named Lifelong Learning Cities. Even more impressively, the lifelong learning participation rate of Korean adults aged from 25 to 64 years in 2005 increased by 23.4% to 36.8% compared to 2004 (Korea Labor Institute [KLI], 2005; Ministry of Education [MOE] & Korean Education Development Institute [KEDI], 2014). MOE in South Korea invested a total of $10,000,000 to fund the Lifelong Learning Cities in 2013 (MOE & KEDI, 2014). One of the Lifelong Learning Cities host national lifelong learning exposition supported by MOE. The exposition held in Seoul, hosted by Kangnam district, on September 6-9, 2015, attracted more than 1 million people to its various activities. Most of the Lifelong Learning Cities held a regional lifelong learning festival every year. It is clear from the above data that the idea of creating a Lifelong Learning City has become a central and vital part of Korean society. According to this context, many studies focusing on LLC practices at the macro level rather than the micro level have been conducted in Korea.

Otherwise, many local areas in South Korea have their own ways of creating LLCs. Findings reveal that the Jeonju City made efforts to connect all related facilities, institutions, and organizations under its own way, sociocultural and historically accumulated in the local area, in order to achieve the four purposes such as improvement of life quality, regional human resource development, vitalizing local economy, and social integration. However, challenges posed by the local area and a government-centered approach for lifelong learning hampered the LLCM by excluding marginalized people as one of the groups of major stakeholders and not achieving the four purposes of lifelong learning successfully.

Jeonju City as a lifelong learning city and a provincial city, has effectively become one of the most exemplary LLCs in South Korea under the national lifelong education system. This paper pursues drawing lessons for constructing Lifelong Learning Cities into other parts of the globe by analyzing the practices for lifelong learning city movement in Jeonju City. The purpose of this study, therefore, was to explore the city’s strategies to build a successful lifelong learning city by (a) reviewing the history and support systems for LLCM in South Korea, (b) analyzing the practices of Lifelong Learning City in Jeonju City and (c) drawing the limitations and tasks for building LLC at local government level.

History and Support System for LLCM

In order to explore history and support system for LLCM, this section reviews history of LLCM, Lifelong Education Act (LEA), and the national organizational structure for lifelong education.

History of LLCM

In South Korea, the LLCM was first initiated at the local level by city/district and not led by the government at the central level (Kwon, 2004). In 1995, Chang Won City first established 'Regulation of Establishment and Management for Chang Won City Lifelong Learning Institute' but did not use the term of lifelong learning city at that time. In order to meet the residents' learning needs, the city has first established a lifelong learning center in each suburb and supported lifelong learning programs by consigning the management of centers to NGOs in the region (KEDI, 2002). Also, Gwang Myeong City first declared itself the lifelong learning city on March 9th, 1999 before the Korean government introduced and supported the lifelong learning cities project in order to maximize the expected effectiveness for LLCM (Lee, 2002). The Korean government did not regulate the LLCM until the Lifelong Education Act was amended on Lifelong Education Act in February 29, 2008.

The lifelong learning city project supported by MOE in 2001 has policies for supporting LLCM at the level of basic autonomous entities (City/County/District). The Project has provided a solid foundation for local autonomous entities to be able to promote various related activities as follows: (a) to reorganize its legislation like regulations or rules regarding lifelong education, which indicates that local autonomous entities become eligible for conducting various projects relevant to this project by establishing lifelong education ordinances, (b) to set up an organization for administering lifelong learning tasks under its administrative system, (c) to establish and reorganize lifelong learning facilities, and (d) to plan and implement local lifelong education projects for setting up organizations such as lifelong education centers or lifelong learning centers, which undertake survey, planning, and research on community lifelong learning, training employees engaged in lifelong education, lifelong learning counseling and providing information, and managing lifelong learning programs and related events (Byun et al., 2005; NILE, 2008). Like this, the LLCM has made a big contribution to systematically constructing and operating a comprehensive system for residents' lifelong learning on the local autonomous entities level in South Korea (UNESCO Institute for Lifelong Learning, 2015).

The 2008 amendment of the Lifelong Education Act (LEA) regulated the various contents related to the lifelong learning city project. The contents included designating and funding lifelong learning cities under article 15, organizing Lifelong Learning City Association for Cities/Counties/Districts under article 14, and designating regional lifelong learning institution by the mayor of the city/county/district, and the superintendent of local educational office under article 21. The Lifelong Learning City

Association was founded in order to facilitate the network among the lifelong learning cities. Its business office was located in the National Institute for Lifelong Education.

Law and National Organizational Structure for Lifelong Education

The LEA of 2008 defines lifelong education as "all types of systemic educational activities other than regular school education, which includes education for diploma achievement, basic adult literacy education, vocational capacity-building education, liberal arts education, culture and arts education, and education on civic participation" (LEA Article 2). It consists of 8 chapters and 46 articles concerning general rules, basic lifelong education promotion plan, national institute for lifelong education, lifelong educators, lifelong education facilities, literacy, the management and recognition of the lifelong learning results, etc.

National organizational structures for Supporting LLCM can be divided into administrative and implementation organizations (Kwon, 2006). In administrative organizations, there is a Lifelong Learning Department in the MOE at the central government level, a Lifelong Education Division at the local government level and the District or City level. In the implementation organizations, there is the National Institute for Lifelong Education (NILE) at the central level, sixteen Local Institutes for Lifelong Education (LILE) in each province, and over forty Lifelong Learning Centers in city and district levels. The structure for supporting LLCM is depicted in Figure 1(Kwon, 2015).

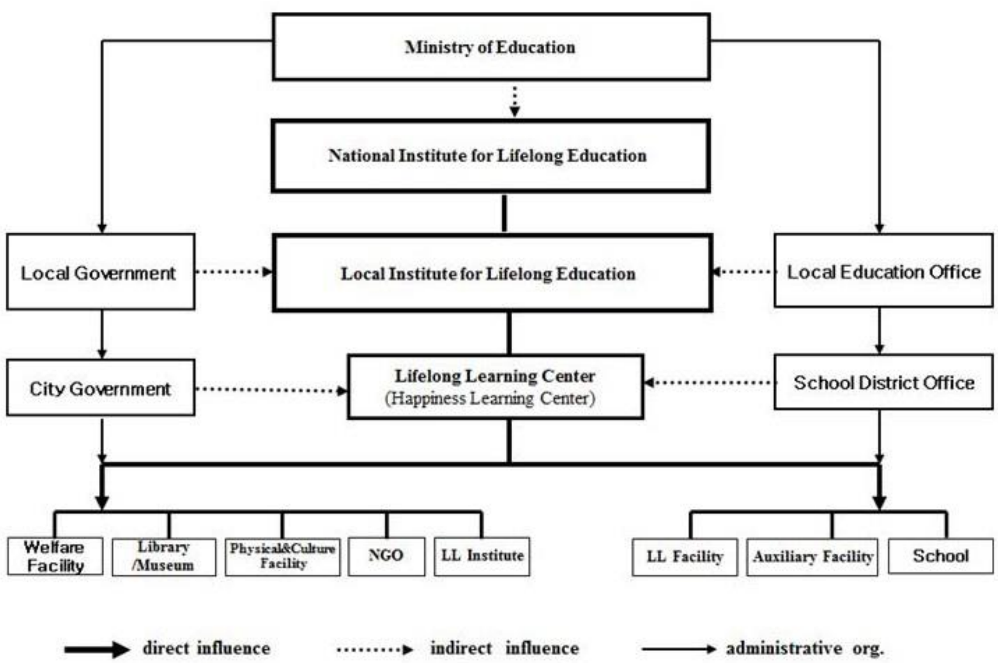

Figure 1. The national organizational structure for lifelong learning in Korea

Projects and Programs Supported by the MOE

The MOE has provided the designated lifelong learning cities with generous and comprehensive support. Cities/counties/districts operate various projects and programs by using the fund of MOE.

Initial Project and Maintenance Fund Support for Building LLC

In order for designated lifelong learning cities to promote their LLCM, the MOE not only supports an initial project promotion fund, but also aids needed budgets for managing public subscription programs. In addition to this, the MOE operates a lifelong learning city consulting project for counseling the lifelong learning city movement, and the regional lifelong learning information system construction project for building a regional lifelong learning information support system.

Happiness Learning Support Center

By 2013, the MOE supported the Happiness Learning Support Center project by way of showing an example in order to support residents-friendly learning with residents' lives in the local region. The MOE selected 95 of 226 city/county/districts to support the operation of this center. The center has been operated at several lifelong learning institutions or community centers within the regions of local autonomous entities (cities/counties/ districts). It hired lifelong learning coordinators or managers and operated customized education programs demanded by residents. It provided learning information to residents by operating a learning cafe.

Operating Credit Bank System (CBS)

CBS-accredited institutions include both informal and formal educational institutions. Individuals can receive degrees if they have obtained enough credits from them. Some lifelong cities including Chilgok County, Gwangmyeong city, and Yeongin city are offering credit courses and operating lifelong learning colleges affiliated to them by CBS. Residents who have finished their courses can receive a bachelor's degree or associate degree from the MOE.

Lifelong Learning Account System

The system is a system that aims to expand the foundation for the social utilization of learned skills and knowledge by cataloging and managing people's various experiences in online learning accounts and then connecting them to academic careers and opportunities, or using them for employment information. LLC helps adult learners register their learning experience into the lifelong learning account system. The number of learning account was 47,826 and learning registered programs were 2,352 in 2014.

Literacy Education for Adult Learners

MOE supports improvements in basic livelihood and social participation to design new opportunities for the illiterate and low-educated adult learners by providing literacy education programs and the academic credential recognition system. In order to support literacy education institutes and their programs, MOE selects and fosters regional literacy education institutes and supports the cost of program operation. They develop instructional materials through LLCs. Specifically; an academic credential recognition system helps the illiterate and low-educated adult learners receive primary and middle school diplomas through participation in literacy programs designated by the provincial superintendents of education. In order to support academic credential recognition system through literacy education, it also cultivates literacy education teachers who will manage designated literacy education courses

Practices for LLCM in Jeonju City

Background and Objectives

Jeonju City was designated by MOE as an LLC in 2004. Education has been selected as one of the three major city policies due to several reasons: (a) mayor's ambition and willingness for pursuing lifelong learning, (b) the citizens' high needs for participating in the lifelong learning, and (c) the education environment that reconciles both traditional culture and modernity. The purposes for building an LLC are improvement of life quality, regional human resource development, vitalizing local economy, social integration, and building a traditional cultural city (Kwon, 2005). The promoting sub systems includes a lifelong learning center, a lifelong learning institutional council, a lifelong education division within the city as an administrational organization, and an education support division within Jeonju Educational Support Office. The major projects were establishing the foundation of the lifelong learning, practicing the high quality citizen education, connecting the lifelong learning with schools, and supporting education for the neglected class.

Practices and Current Status for Lifelong Learning

Jeonju lifelong learning city is led by city hall and the Jeonju educational supporting office. The promotion body is the lifelong learning center of Jeonju City. It established partnership through the conference between lifelong learning institutions. It is operating lifelong learning webpage, various lifelong learning programs, and multiple conferences and forum by lifelong learning professionals. According to the implementing system of the lifelong learning city in Jeonju City, outcomes of the program and projects practiced for lifelong learning in 2014 can be categorized by the four major areas such as improvement of life quality, regional human resource development, vitalizing local economy, and social integration (Jeonju Lifelong Learning Center, 2015). The next section illustrates the outcomes of these four areas.

Improvement of the Life Quality

In order to improve Jeonju citizens' life quality, there are projects and programs such as participation in the national lifelong learning exposition, organization and activation of lifelong learning circles, operation of reading circles, humanity courses, generation unification courses, and leisure and hobby courses. First, the major lifelong learning institutions in Jeonju City participate in a national lifelong learning exposition every year. The program example is providing promotional booth and gallery; moreover, they operate an experiential program that publicizes special regional program. Second, new lifelong learning circles are being organized and activated every year. For this, Jeonju City financially supported 38 lifelong learning circles in 2014. Third, Jeonju City supports the unification and activation of book clubs and reading circles. In order to activate activities of reading circles and facilitate communication between them, the city supported various activities of reading circles in 64 local areas. Examples of the major activities include newspaper, forum, debate, institutional assembly that supports the budget, book clubs, and reading circles. Fourth, the city offered courses for humanity academy such as history or traditional subjects open to citizens. In 2014, humanity academy offered 35 courses in five subject fields. Fifth, the city operated humanity academy to promote generation unification. In 2014, about 400 adults and 200 schoolers attended the academy. Sixth, non-formal lifelong learning programs such as leisure and hobby courses were offered at the city's lifelong learning center. In 2014, 32 courses were taken by about 2000 people.

Regional Human Resource Development

In order to develop local human resources, the city is supporting programs such as education courses for Korean traditional culture for elementary students, networking opportunities for those employed in lifelong educational institutions and groups, courses for bringing up and training Lifelong Educational Instructors, and training leaders for Lifelong Learning Circle. First, the city opens courses for traditional cultural experience in order for young schoolers to learn historical figure's spirit. To train a person who can love both local city and country, the traditional culture courses were offered for local elementary students at the Traditional Culture Training Center. Second, the city hosted and supported Jeonbuk Provincial Network for employees of lifelong educational institutions and groups. Third, the city operated courses for educating Lifelong Educational Instructors. They offered courses in different levels such as basic courses, professional courses, and special courses for Lifelong Educational Instructors. Fourth, the city educated the leaders for organizing and operating Lifelong Learning Circle. They have performed the roles of coordinator for a lifelong learning circle and manager for multiple learning circles. The training period was 6 months. In 2014, 60 students were trained and appointed as lifelong learning leaders.

Vitalizing Local Economy

Jeonju City held the lifelong learning products display and exhibition for local economic activation during the Jeonju Lifelong Learning Festival. First, Jeonju City held the Lifelong Learning Festival composed of about 100 lifelong education institutions and lifelong learning circles. The main focus was to promote each institution's and group's activities in general. Second, the city displayed the products about lifelong learning and provided exhibitions to make products commercialized. Examples are chinaware products, paper art, western art, and eastern art. The samples of the displayed products were sold in the traditional crafts exhibit hall in Jeonju City.

Social Integration

For social inclusion, Jeonju City implemented several initiatives for social integration. Those were special courses for networking regional lifelong education institutions, providing lifelong learning information, neglected classes for lifelong learning, and Hope School for resolving adults' illiteracy. First, for special courses for networking among regional lifelong education institutions, for example, the city provided supports for several areas in retired citizens' social participation, local community problem solution, and sharing the results for institutional coexistence. Second, the city offered comprehensive information about citizens' lifelong learning to its citizens. For instance, those were e-newsletter, lifelong learning webpage, lifelong learning exhibit through social network services, and lifelong learning light board. Third, the city supported neglected classes due to regional, educational, and age differential problems. Support of the neglected classes program was focused on fixed and visiting programs and 30 institutional programs were funded in 2014. Fourth, adults'literacy education and basic education diploma could be obtained through the adult Hope School. Major institutions and groups of this program include evening schools, elder welfare programs, social welfare programs, and prisoner programs. About 200 people have been benefiting from this program.

Limitations and Tasks for LLCM at Local Government Level

Limitations of Jeonju LLCM

It has been 11 years since Jeonju City was selected by MOE as a lifelong learning city. Accomplishments and limitations for LLCM are discussed in this section. In view of limitations of adult education, as Cunningham (1993) pointed out, Jeonju City's LLC has a gap between its ideal and reality that needs to be addressed for improving its current practices. First, Jeonju City's lifelong learning city policy is humanism oriented, but in reality, it is not. According to Cunningham, the myth for adult education is to help adult learners achieve self-actualization to be a better person and a better societal member; however, in reality the city's practices in adult learning are oriented toward and for the sake of learning city policies. Second, the city's policy on lifelong learning is insufficient to reduce the gap between the educated and the non-educated. Based on Cunningham, the main goal of adult education is to reduce the gap between those who learned and those who are neglected for educational opportunities, but more chances for lifelong learning were given to the educated in Jeonju City. As an example, the lifelong learning for Jeonju citizens indicated high participation from middle to high class citizens and low participation from low class citizens (in terms of annual income level). Third, Jeonju's lifelong learning city was not centered on learners and did not empower adult learners. Cummingham (1993) emphasized that adult education practices should be learner oriented and should enlighten learners to become knowledge workers. Jeonju City's lifelong learning initiative seemed to not center on individual learners but on teaching practices and program implementation matters. Also, it lacked empowering of adult learners by excluding learners from the practice. Fourth, Jeonju City lifelong learning policy was weak in pursuing social equity**.** According to Cunningham (1993), adult education may fail in pursuing social equity due to racial, sexual, and class discrimination. Some of the Jeonju City's lifelong learning programs are considered inappropriate in the areas of multi-cultural education, elderly education, and neglected classes. Fifth, the policy for developing lifelong learning city was not consistent and sometimes biased. The goals of developing Jeonju lifelong learning city included improvement of life quality, regional human resource development, vitalizing local economy, and social integration. Many programs were developed to accomplish these purposes, but programs for vitalizing local economy were a few. Sixth, since 2007, the government budget for lifelong learning cities has been reduced. To overcome this issue, Jeonju City government tried to raise a fund to support its programs, but a failure to expand the fund slowed the development of new lifelong learning programs. Seventh, lifelong learning networks and partnerships between institutions and learners have been superficial and weak. Eighth, it has been more than 10 years since Jeonju City was appointed as a lifelong learning city, but the lifelong learning infrastructure including lifelong learning implemented? organizations, human resources, and finances is still not complete and in process. Ninth, in improving the lifelong learning city, an evaluation system for monitoring the feedbacks from citizen and stockholders does not exist.

Accomplishments for of Jeonju LLCM

There are, however, several accomplishments of the Jeonju City's lifelong learning initiatives including improvement in the recognition of lifelong learning, diversification and extension of regional lifelong learning program, building networking for regional community, improvement of professionalism for regional lifelong educators, expansion of local government's investment, and building legal and institutional bases for lifelong learning.

First, after the Jeonju City was selected as a lifelong learning city, the recognition of citizens' lifelong learning and motivating their participation for learning have been improved to a significant degree. The citizen's pride in loving one's city leds to increase in the participation for lifelong learning, feelings for settlement, and established identity of the region. Second, through the analysis of citizen's need, lifelong learning programs could identify learning needs for the program clients. Due to this effort, various lifelong learning programs could be developed and supported by a city. Third, the city has been improving the quality of learning service through forming a network between lifelong learning institutions, reframing institutions for lifelong learning, and reinforcing lifelong learning educators' ability. The city is also leading the unification of lifelong learning service for citizens by forming the network between educational institutes and the local government. Fourth, the city launched a lifelong learning center. They hired lifelong education experts and also trained public officials, leaders of each learning circle, NGO leaders for understanding the importance of lifelong learning. Furthermore, the city strengthened professional lifelong education by expanding the placement of experts in lifelong education institutions. Fifth, the city has been securing and increasing the budget for lifelong learning education through annual provincial assembly meetings to support lifelong educational institutions and expand the citizen's opportunity for lifelong learning. Sixth, the city has been enacting rules and its ordinances to support citizen's lifelong learning consistently, and forming a promotion institution called lifelong learning center to improve communication between lifelong learning institutions.

Tasks for LLCM at Local Government Level

On the other hand, from the analysis of the practices of Jeonju LLC, tasks for building a lifelong learning city in South Korea seemed to successfully meet the need for vitalizing regional lifelong learning such as modifying laws for supporting lifelong education administration, securing at least 1% of national budget for lifelong education, setting clear purpose and direction for regional lifelong learning, structuring provincial lifelong education organization, actualizing lifelong education promotion system, introducing recognition systems for monitoring lifelong learning city policy, educating lifelong learning professionals, arranging them and enhancing their abilities, operating bottom-up lifelong learning systems on behalf of citizen, organizing and vitalizing learning circles, and separating and networking local lifelong education implementation systems between city government and local education support.

Conclusion and Suggestion

Although the achievements of nationwide LLCM have contributed in building local learning communities, social integration, and local development in South Korea, the political, social and economic rationales for the Korean LLCs movement have not been adequately addressed. Nor has the impact on society been adequately dealt by the LLCM at the city government level. This paper explored Jeoju city's strategies to build a successful lifelong city by analyzing the practices for LLCM and then provide the limitations and tasks for building Lifelong Learning City at local government level
As a conclusion, we found a gap between the ideal and the reality for Jeonju LLCM as Cunningham (1993) had pointed out. First, LLCM in Jeonju ctiy is targeting for lifelong learning from a humanitarian perspective, but in reality it is not practicing the philosophy. Second, it failed to reduce the gap between the educated and the non-educated. Third, it is not centered on the learner and not empowering adult learners. Fourth, it is insufficient in pursuing social equity. Fifth, policies for building a LLC in Jeonju City are not consistent and unbalanced in order to overcome the gap between ideal and reality for LLCM. Sixth, Jeonju City government tried to sustain an appropriate level of operation fund, but the effort was not effective compared to other cities. Seventh, lifelong learning networks and partnerships are superficial in nature. Eighth, lifelong

learning infrastructure is immature. Ninth, a monitoring system for improving LLC through getting feedbacks from citizens and stockholders does not exist.

In order to promote LLCM at the local government level successfully, the city/county should give residents autonomous right to solve community problems with their collective efforts. It should make a full use of the local residents' autonomous facilities and organizations in fostering lifelong learning. It should place lifelong educators who plan local lifelong education projects at various centers and institutions, offer various lifelong education programs, and hold various lifelong education events at lifelong education institutions. In sum, Jeouju's LLCM should provide learning opportunities for adult learners by strengthening administrative organizational structure with regard to citizen education, and encouraging residents to play an important role in building local learning communities by voluntarily organizing study groups under the support of the city.

Lastly, as a suggestion for the Korean lifelong education policies for building LLCM successfully, LLCM needs to be implemented vertically from the central government to local regions and at the same time, horizontally integrated through cooperation between local and regional agencies in order to embed lifelong learning in the whole life of the people. Also, lifelong education should be recognized as a key strategy in building a national safety guard and to increase social investment. Moreover, the immediate future will call for increasingly creative humans, so flexible lifelong education systems need to be established in order to foster a learning environment at workplaces. In an increasingly globalized marketplace, national competitiveness can be equipped through lifelong education. Therefore, an active global network should be created in order to establish an internationally adaptable system for networking and educational accreditation.

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EDUCATION INTERRUPTED: KOSOVO 1980-1999

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ABSTRACT: The period between 1980 and 1999 was one of interruption of education for Albanian students in Kosovo. Serbian students were allowed to attend school, which was now taught in the Serbian language that excluded Albanians. A parallel system of education evolved in which secret house-schools were established in order to educate Albanian speakers in their own language. This study recounts the time through the eyes of students, teachers, and others involved in education during this period. The paper describes measures undertaken to restore education of Albanians in Kosovo, implications for the future, and a caution to keep in mind.

Keywords: house-school, Kosovo, primary education, secondary education

The area formerly known as Yugoslavia (now Balkan region) consisted of several states: Croatia, Slovenia, Bosnia, Macedonia, Montenegro, and Serbia, which includes the province of Kosovo. It is a region with a complex mix of languages, religions, and ethnic groups. At the end of the two-decades of interest, Kosovo was the poorest and most densely populated area of the former Yugoslavia with approximately 2 million residents. Ninety percent of them were Albanian, and the rest were mainly Serbs, each speaking a distinct language. The Serbian language is closely related to the Slavic languages spoken in the other states, but the Albanian language is not related to the Slavic languages (Andryszewski, 2000).

For the past 1,500 years, the region has had periods that were peaceful interspersed with many conflicts between the various groups. After the end of World War II, Marshal Tito became the leader of a reunited Yugoslavia. Through the 1950s, 1960s, and 1970s, Tito managed a balancing act that avoided much ethnic conflict, even for minorities living in areas dominated by other ethnic groups. Kosovo itself was considered an autonomous zone within the Serbian region of Yugoslavia. A new constitution was passed in Yugoslavia in 1974 that specifically guaranteed Albanian rights and limited self-government in Kosovo. But after Tito's death in 1980, the old ethnic conflicts re-emerged. In 1989, Slobadan Milosevic was the most powerful politician in Serbia. He ended the semi-independence of Kosovo and made the people completely subject to Serbian rule (Andryszewski, 2000; Buja, 2011). From this time onward, conflicts escalated throughout the Balkan region, eventually culminating in outright war. The Kosovo Liberation Army (KLA), with the support of NATO and the Albanian army eventually prevailed and Serbs completely withdrew from Kosovo. The 15-month war had left thousands of civilians killed on both sides and over a million displaced. Although Kosovo gained its freedom in 1999, the impact of two decades of conflict on Kosovar Albanians was dramatic and dire.

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The purpose of this paper is to share with the international community how the political developments in the former Yugoslavia, with emphasis in Kosovo, during the 19-year period between 1980 and 1999 impacted education. This paper will present some key events that occurred during 1980-1999 and describe Albanians' efforts over decades of

struggle to be educated in their language. The goal of this study is to present the challenges in education of Albanians in Kosovo during the former Yugoslavian /Serbian oppression in Kosovo. This research will bring to the US and international audience some experiences and perceptions about education during the period between years 1980-1999, as well as some of the challenges and consequences that influenced young peoples' lives in Kosovo. The research will address the questions of how education evolved during that time and the consequences that continue to impact Albanians in Kosovo even today.

Method

Context and positionality are important in qualitative research. This study originated from a class discussion in an adult education doctoral program in which the first author was enrolled and the second author was the facilitator. The first author is a citizen of Kosovo and certified by the Ministry of Education, Science and Technology in Kosovo as a translator. One night she was describing to her class colleagues how education was interrupted by war during her youth. She mentioned that after the war ended, some people whose education was interrupted did not return to school because they were too busy "just celebrating being alive." Kosovo has a generation of young adults who missed some of their education and the country is now trying to decide how to respond.

In addition to the lived experience of the first author, this paper presents the experiences and stories of others who lived in Kosovo during that time. The first author conducted interviews with individuals who were directly affected by the challenges they faced as students, teachers, and government officials who were engaged in educational processes in Kosovo. These semi-structured interviews were conducted in person and via electronic mails with questions related to the period of 1980 through 1999. This research is grounded in social constructionist theory in which "the construction of knowledge is viewed specifically as a result of our experience with human practices that prompt understanding, which inherently vary from individual to individual" (Egbert & Sanden, 2014, p. 22).

Participants

Eight participants–four males and four females–were interviewed for this study. Traditional Albanian names have been assigned to them as pseudonyms. Four of them now work at the Kosovo Ministry of Education, Science and Technology. Three of the men (Agron, Besnik, and Trim) and two of the women (Shpresa and Besa) were students during that period. Agron is now a senior official at the Ministry for the Kosovo Security Forces. Besnik is now a male nurse. Trim is from the capital of Prishtina, but now lives and works in Switzerland. Shpresa is also from Prishtina and is now a professor of pedagogy who also works at the Ministry of Education, Science and Technology. Besa is now a psychologist, and during the period under study, her family offered their house for use as a school. The remaining three participants were educators during this period. Agip was a school principal, and today he is a professor of the Albanian language and also the head of the Agency for Adult and Vocational Education within the Ministry of Education, Science and Technology. Ermina was a teacher in a primary school in Prishtina. Her father was Albanian and her mother was Croatian. She is now an official at the Ministry of Education, Science and Technology. Finally, Elmase is a Bosnian woman living is Prishtina who is now an official at the Ministry of Education, Science and Technology. During the period under study, she was teaching the Serbian language in a primary school in Prishtina. Her husband is an Albanian who lost his job. Their children were considered to be Albanian and were not allowed to attend the school where she was a teacher; rather, they had to attend a house-school.

Two Decades of a Parallel Universe in Kosovo

The period from 1980 until 1999, when Kosovo was officially a Serbian-run state, was a time of parallel existence especially with regard to government and education. Albanians boycotted the new Serb government that evolved under Milosevic and supported an unofficial government run by ethnic Albanians. Thousands of Albanians were fired from their jobs, and many others quit in protest. Although this paper will describe some general conditions and experiences, the focus will be on education.

The impact on education was also dramatic and dire; it also resulted in a parallel universe. Although higher education was affected and the faculty and students of the University of Prishtina were active participants in the struggles, theirs was a story of political activism. Those students already had completed many years of education, even if their higher education was interrupted. This paper focuses more on primary and secondary education for two reasons. First, the Albanian author was in the cohort of younger students whose education was interrupted, and she has the lived experience of alternative schools Second, the students who were in primary and secondary school during the conflict are the ones who ended up with a suboptimal educational experience and no educational credential.

Until 1992 schools in Kosovo were a place where all communities learned together in cooperation and peace: then, suddenly, in September of 1992 this changed. According to Agim, who was a school director at the time, this was when "Serbians took off their mask," dismissed the leadership from schools, and forced the teachers to use Serbian curricula. As students and teachers waited for the doors to open at the start of the new school year, the doors did not open for Albanian students. Albanian teachers and students were not allowed to enter the school buildings. Besa reported that even as young children, they realized that the situation was worsening and becoming frightening. Elmase cried as she recalled Serbian police throwing gas so that Albanian students could not enter the school. This was when fate divided these Albanian students from students of other communities. Shpresa noted that the social divisions with other ethnic groups did not happen right away. At first they still greeted each other, but day by day the Albanian and Serbian children quit speaking to each other.

Serbs banned use of the Albanian language in schools, both in the classroom and also in textbooks and other resources.

> To deny someone the right to speak in her/his own language is the first step toward his/her denial as a political factor. The inequality of citizens in the sphere of the use of native language in education implies the reduction of the rights in the field of culture. Language and culture are inseparable factors. (translated from Osmani, 2009, p.13)

Because other ethnic communities like Turks, Bosnians, and Serbs accepted the mandatory curriculum in Serbian, they were allowed to enter the school and continue to have their education financed by the state. They enjoyed all the rights of children for a normal education and a normal childhood and life. They had classes with all the equipment for a normal learning environment, labs and offices for staff, heating, transportation, parents who worked and did not have financial difficulties. Most importantly, their lives were safe. On the other hand, Albanians were left outside the schools, and their future was in the hands of fate.

In some schools, especially in the capital of Prishtina, Albanian students continued to use school facilities where Serbian students and students of other ethnic backgrounds studied. There were some changes regarding the division of classes. Although Serbian students were few in number, they had a larger classroom space and all the offices, laboratories, and equipment. Although Albanians made up the majority of students, they were only allowed to use a small classroom space in the school building. Due to the lack of classrooms, lessons for Albanian students were organized in several shifts. Classes were shortened from 45 minutes to 35 or even 30 minutes in order to create time and space for other Albanian students in the school.

The Dismissal of Albanians from Jobs and its Effects on Education

Another obstacle to education were the severe economic conditions. Dismissal from jobs of all Albanians created an economic crisis for Albanian families. This situation was impacting Albanian families; most parents were unemployed, without any financial income. Each day that they left their houses to try to get a job or work in the market put them at risk of harassment or harm from Serbian police. It was difficult to afford everyday living expenses and paying students' expenses was almost impossible. Often families were unable to provide even clothing for their children to go to school.

Agim remembered that "there were lots of attempts to bring some books from Albania or print somewhere in Kosovo, but they were caught by the Serbian police and all text books were torn, burned, and demolished." Most students could not afford to buy the few books that were available in the Albanian language. Since books were not available, students depended on pens and notebooks as their only supplies. Albanian teachers were the first to be dismissed from their jobs by Serbian police but were so dedicated to teaching students that they were organizing classes, even without pay. This injustice toward Albanian teachers and students attracted international attention. The American Federation of Teachers was one of the international organizations that protested against this injustice, and the head of the American Federation of Teachers wrote a letter to the president of Serbia:

> On behalf of 790,000 members of the American Federation of Teachers we request a stop to discrimination against Albanian people. We are writing to you to protest for the systematic repression against Albanian schools in Kosovo and human rights of Albanian people in Kosovo. We are shocked that your government closed hundreds of schools in Kosovo since November of 1991, closed all secondary schools in the Albanian language and dismissed thousands of Albanian teachers, which violates the fundamental right of gathering and expression. We know that about 21.000 teachers are without personal income, whereas 450.000 pupils and students were denied the right to be educated in their native language. This repression against Albanian education in Kosovo violates the international covenants that guarantee cultural autonomy to Kosovo, a covenant that is signed by the government of Yugoslavia, as well. On behalf of 790,000 syndicated members of the American Federation of Teachers we request a stop to discrimination against Albanian people and to fully respect the right of educational authorities in Kosovo to reopen their schools and universities with respective funding for this activity. (Osmani, 2009, p. 97)

In addition, the "European Conference of World Confederation of Organizations for the Teaching Professions (CMOPE) held in Geneva condemn[ed] all discriminatory and segregation provisions by Serbian authorities against the Albanian language and people that comprise 90% of Kosovo's population" (Gashi (2014, p.144). This advance led to a mobilization of Albanian people in Kosovo and in the diaspora. Families began to help each other; students helped each other students, sharing textbooks and notebooks. At the same time the Albanian government in exile was mobilizing Albanians around the world to help Albanian families and schools in Kosovo. Later, the government in exile provided a "salary" or modest stipend for teachers in the amount of 20 German marks per month, which was later increased to 40 German marks per month. Regardless of all these difficulties teachers were determined to continue to work without pay in order to keep the learning process continuous. It was patriotic work, because these teachers believed that they were carrying on their shoulders the fate of an entire nation. Their sacrifices in those days were the contribution that they gave to the foundation of the state of Kosovo.

Poisoning of Albanian Students in Primary and Secondary Schools

In some schools, especially in the capital, Albanian students continued to use school facilities where students of other ethnic backgrounds as well as Serbian ones learn. There were some changes regarding the division of classes. Although Albanians made up the majority students, they were only allowed to use a small classroom space in the school building. Serbian students, although few in number, kept for themselves a larger space and all the offices, laboratories, and equipment. Thus, in the absence of classrooms, lessons for Albanian students were organized in several shifts where classes were shortened from 45 minutes to 35 minutes and in some cases even 30 minutes in order to leave space to other students to learn in that school. Ermina, who was a primary school teacher at the time remembered that one day she was sharing the same meeting room and table with Serbian colleagues, when suddenly she was relocated to teach Albanian students in the basement, while her colleagues were still teaching in normal classes. Ermina claimed that they continued to share the same school building because they were in the center of Prishtina and the authorities "still wanted to show to the international community and media that everything was normal in Kosovo."

Separating Albanian students from Serbian students and students from other nationalities was another way for Serbian Secret Police to continue the violence and terrorism towards Albanians.

> During the period of March and June of 1990 there were 7,000 people of Albanian nationality poisoned by the "mysterious" poison by the Serbian Secret Police. Also they were not allowed to be hospitalized because as the Serbian authorities said "they were faking and that was a hysteria of the Albanian nationalists." Even Serbian doctors refused to accept Albanians as patient which goes against the doctor's professional ethics. Furthermore, Serbian doctors were accusing Albanian doctors that were helping Albanians for "acting"–because according to the Serbs, the Albanians were not poisoned. People who were poisoned were mostly secondary school students, but there were also primary school students, children from 4-9 years old, and the majority of all poisoned students were females. Some of the symptoms of this poison were headaches; hallucinations and feelings of close death; nightmares; dizziness; weakness; suffocation; muscle pain; eye, throat and nose burns; diarrhea; hypertension; flushed face; coughing; dried lips; and photophobia. All these were denied by the Serbian authorities, only to be proven by international experts. The director of the International University Reference Laboratory found out that young people of Kosovo were poisoned with the military nerve agents sarin and tabun. The British investigative documentary *World in Action* found out that the poisonous nerve gas was produced by the Yugoslav Populist Army and was used in 1990 to poison thousands of Albanian students. (translated from Gashi, 2014, pp. 55-57)

Agim claims that "even today people suffer the consequences of that poison."

House-Schools

Although students in the capital of Prishtina were sometimes able to use a small portion of the existing schools and attend school in shifts, this was not the case in other cities and in rural villages of Kosovo. Creating an independent, parallel education system for Albanians was needed and the organization of learning outside teaching facilities had begun. As Kojçini-Ukaj (1997) noted: "Massive education and schooling of a nation is the best form and way of preserving the identity, and rise of a nation's awareness, as well" (p. 5). The unprecedented commitment of Albanian intellectuals, parents, and teachers together enabled schooling for Albanian children to continue even outside the school buildings, although in extremely difficult conditions. Families offered their homes to be transformed into classrooms. Some gave the entire house to be used as a school, some several rooms, or just a room, depending on the space that they had. Thus one class of students would go to one house, while another class went to a home in another neighborhood. Trim reported that for safety reasons house-schools were usually on the outskirts of the city in less frequented areas. Besa's family provided two rooms and she noted that for an entire year her bedroom became her classroom, with a blackboard and places for 20 students to sit. Elmase recounted that "in a room of 3.5-4.5 meters squared learned 45 students who had to write on each other's backs."

The safety of children was another concern of teachers, parents and house owners. Albanians were constantly threatened and harassed by Serbian forces operating in Kosovo. According to Shatri (2010) the home owners would do their best to protect teachers and students from Serbian police (p. 63). While students were in class, someone (usually the home owner) would stay outside in case police came to check the houses. In those cases, the home owner would run and try to hide children in closets of the house. They would hide the students' shoes so that it would appear to police that there was only the family staying there. But the home owners themselves were at risk. Trim reported that if the Serbian authorities found that someone had offered their house as a school for Albanian students, and added "the owner of the house then would be arrested, physically and mentally maltreated, and condemned [sic] with money or jail. This also happened to teachers in most cases."

There were many factors to be considered that made teaching and learning an everyday challenge. An attempt was made to transform the space into classrooms, but these were residential rooms not made for classrooms. Classrooms were too small and there were often no seats; students sat on the floor. Shpresa remembers having seats in the house-school but the students fell from them because the seats were old and broken. Trim noted that there were no labs for practice and experimentation. The classrooms often did not have tables, blackboards, or heat in winter. In some places there was no electricity especially in villages where the population was Albanian (Shatri, 2010, p. 63).

Since Albanian books and textbooks were banned by the Serbian authorities, this was another challenge for teachers and students. There were only two Albanian language books that were printed in 1995 for the first and second year of the secondary education (Shema, 2000). Even though they were not expensive, not everyone could afford them. For other subjects there was no literature in the Albanian language. Therefore, teachers had to gather materials from different books and from literature in other languages and translate them to the Albanian language. Then the challenge was how to give all that material to students. Most students could not afford to print all the materials for classes, and there was the problem of where to print these materials without being noticed by Serbian police. The only way to transmit information was for the teacher to dictate the material and for the students to take notes. The first author remembers how class started; when the professor entered the room she would just start reading from her notebook and the students all wrote as fast as we could to take all the notes. We would write for the entire class period, for 30-40 minutes, and then the class was over. There was no time for discussions in class, because there was no time to take the notes and discuss them in one class. Also, not all students could write very fast, so some could not keep up with the dictation and get all the notes. Therefore, the students had to share their notes to see if someone got the whole sentence so we could complete the notes and then learn the material. Lacking chairs and tables in class, students used to sit in rows on the floor and used a friend's back as a table on which to write. In some rooms there were benches where five or six students would sit in one bench. It was impossible to write, especially when a student was left-handed, without bumping another student's arm.

The difficulty of the learning process in class was nothing compared to the road from school to home and vice-versa. In spite of the challenges, Ermina believes that "learning in so-called house schools wasn't traumatic but the violence from Serbian police in those schools was something that traumatized children at that time." Besa remembered that students were told to be attentive to their surroundings and not to carry school bags that would identify them as students. Shpresa reported that students had to hide their notes under pants and t-shirts in order not to be caught by Serbian police, as they never knew when they would be stopped. Besnick talked about being stopped by the police. When they found his student ID and grade register, they tore it from him then abused him physically and psychologically. Trim confirmed that if Serbian police found textbooks or notebooks they would physically abuse the student in the street and tear up and destroy the notebooks and books. Agron also reported physical and psychological maltreatment by Serbian police and was unable to complete his secondary education. Ermina told of colleagues in other cities facing more difficulties during that time "as they were constantly arrested, physically maltreated in front of their students." Agim, the school director, was called and interrogated by the Serbian police seven times. He cried as he recounted how hard it was for him and especially for his family and "it was too much for students to see me get arrested and maltreated in front of them."

Another difficulty that children faced during this time was traveling to school during winter time. As Trim noted, there was no public transport at the time. In the absence of public transport children walked to schools on rainy days and in winter, so when they arrived in class they were all muddy and wet from the rain and snow. Shpresa remembered changing socks in class because their old shoes allowed the rain to get their socks wet. In some houses there was heat with wood. While students stood in class they dried their clothes and shoes to wear again to return home. Some house-schools did not have heat, so students wore the same wet clothes and shoes until the end of the school day. Often the children stayed in school without food and drink because their parents could not afford it. In some cases, during cold weather the homeowners offered tea to students and teachers.

But no matter how parents and students were trying to keep students in schools, other circumstances were leading them to another direction. Day by day students were missing in school, especially in secondary and in higher education. According to Shpresa, her friends from primary school were able to continue their education and have good careers, but her male friends from secondary school had to stop attending school and their children did not know where they went. One severe reason for the disappearance of the male schoolmates was the economic situation and the violence by the Serbian government. According to Shatri (2010) by the end of school year 1991/1992 Serbian police maltreated 3,250 educational professionals, about 300 children/students and tens of parents, (p.91). Therefore, a lot of families had to leave Kosovo hoping for a better life in the European Union, the United States, and beyond. Albanian graduates had difficulty finding jobs, and many young people left the country. After the war ended, Shpresa used social media such as Facebook to find the male friends who had left secondary school. Those she found told her that they had gone to European countries and found jobs in different fields–but they never continued their education.

It is difficult to describe in words the commitment, willingness and eagerness to learn and to educate children in those conditions, hoping for a better future. Besa said that the parallel system made them socially responsible because "the entire Albanian community was responding positively to every need the teachers and students had in order to support [the] education of future generations." In retrospect Elmase recounted that "it was worth sacrificing for that generation and for education." She told the story of her son, who went to study in Austria. When his professors asked where he did his schooling, he returned to Prishtina, took a picture of his house-school and sent it to his professors, telling them "here is where I finished my secondary school." Shpresa expressed gratitude and respect for the people who allowed house-schools in their homes. "They became part of our educational journey…we recall them with the highest respect and they always join us in anniversaries of the school and cohorts. They were one of us." Agim noted:

> I believe that teachers gave a special contribution at that time. A decade out of legitimate school buildings and being educated in these conditions, did not stop education of Albanians, but I have to admit that the quality of education was impacted from the lack of proper educational institutions. Still, people got educated and I think these hard times helped raise awareness as a nation, and those students of that time were the ones that formed Kosovo Liberation Army and fought against Serbian military forces in 1998-1999. Due to all these developments lots of students had to stop schooling. I want to mention here that even during the war, where peoples were standing on refugee camps teachers organized classes to keep children engaged and not to stop schooling. After the war most of those students who were in Kosovo stopped schooling during 1990-1998. They continued their non-formal education, but unfortunately this didn't happen with those who had to emigrate. There is a lot to say for that period…. And it is very touching as we had to live through hard times … but, I want to add that that period of ten years left a multidimensional stamp on Kosovo, and on Albanians' lives.

Implications

Since the war ended in 1999, there has been a renewed focus on education in Kosovo. Non-governmental organizations (NGOs) such as UNICEF are analyzing education in Kosovo at the primary and secondary level (Wenderoth & Sang, 2004). Academics from the University of Prishtina have partnered with universities in other countries such as the United Kingdom (Bache & Taylor, 2003) to reconstruct higher education in Kosovo. In addition, the Kosovo Ministry of Education is exploring options for the lost generation whose education was interrupted. The first author, who is employed by the Ministry of Education, is in the United States learning how the General Educational Development (GED) tests used in the United States and Canada as a high school equivalency diploma might serve a similar purpose in Kosovo. These GED tests measure proficiency in science, mathematics, social studies, reading, and writing. But Bache and Taylor (2003) warn that it is imperative to understand the local context in order to avoid "the 'Frankenstein' syndrome…which they believed had developed in other post-Communist states. This was the inappropriate adoption of practices from elsewhere…" (p. 285) that became dysfunctional in the new setting.

The tears shed by the participants of this study recounting their stories of the years between 1980 and 1999 make it clear that there has been a long-lasting impact on their lives. We do not know how long that impact will last for them or for future generations. Recent research suggests that the trauma imposed on Holocaust survivors (Thompson, 2015) and Native Americans may be affecting them at a cellular and genetic level (Pember, 2015). The relatively new scientific field of epigenetics is exploring the effects of intergenerational trauma. The 1,500 year history of conflict in the Balkans, and the ensuing effect on education, could potentially have results similar to intergenerational trauma.

A study done in Kosovo in 2011 found that elderly people in Kosovo has a low educational level and that almost half of respondents perceived themselves as poor or extremely poor (Jerliu, Toçi, Burazeri, Ramadani, & Brand, 2012). The researchers concluded that "demographic trend coupled with the economic and political transition raise serious concerns about increasing needs for socioeconomic support of elderly people in Kosovo" (p. 8). If the Ministry of Education is able to devise a credentialing system that recognizes the learning that occurred in house-schools, it may prevent this cycle of poverty from continuing.

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DIVERSITY TO INCLUSION: EXPANDING WORKPLACE CAPABILITY THINKING AROUND ABORIGINAL CAREER PROGRESSION

Kaye Morris[1]

ABSTRACT: Optimally all individuals should contribute fully to the collective spirit and human capital within the workplace, supporting and enabling the development of a mature workforce. Human resource policies endeavour to address diversity and inclusion in the workplace through a variety of methodologies including training and professional development programs. However the shift from achieving organisational diversity to organisational inclusion is not automatic. Organisational maturity demands careful diversity planning to embed inclusive practice. The Office of Environment and Heritage[2] (OEH), is on track in providing opportunities for a diverse range of employees. In 2015 OEH exceeded the Council of Australian Government (COAG) target for Aboriginal Employment. OEH is role modelling best practice for Aboriginal recruitment within the Public Sector. Once employed however, Aboriginal staff are not progressing to higher salary bands. This paper attempts to prompt thinking around Aboriginal Progression in OEH and look at ways to achieve the NSW Public Sector Aboriginal Employment Strategy 2014-2017 which sets a target of 1.8% salary band increase across all classifications for Aboriginal people by 2021.

Keywords: Australia, Aboriginal, Diversity, Inclusion, Workforce Capability

There is a commitment to developing and nurturing Aboriginal capability across the NSW Public Service. The Council of Australian Governments (COAG) National Indigenous Reform Agreement clearly outlines the need for all governments to "Close the Gap" on Indigenous disadvantage. The NSW Government, along with state and territories have committed to increase Aboriginal representation in the public Service to 2.6% by 2015 (NSW Public Service Commission [PSC], 2014).

The NSW Public Sector is a major employer of Aboriginal people and continues to demonstrate best practice in Aboriginal employment. In fact The NSW Public Sector has made good progress in Aboriginal employment over the last ten years, with Aboriginal employment being the highest it has ever been. Currently the NSW Public Sector is enacting the NSW Public Sector Aboriginal Employment Strategy 2014-2017, which

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[2] OEH cares for and protects NSW's environment and heritage, which includes the natural environment, Aboriginal country, culture and heritage, and built heritage. OEH provides services and other support to the Royal Botanic Gardens and Domain Trust, NSW Environmental Trust, Western Sydney Parkland Trust, Parramatta Park Trust, Centennial Park and Moore Park Trust, Historic Houses Trust, Taronga Conservation Society Australia, Jenolan Caves Reserve Trust, and the Environment Protection Authority. The Office of Environment and Heritage (OEH) consists of seven functional areas: Policy: National Parks NA Wildlife: Customer Experience: Regional Operations: heritage: Science and legal Services.

falls out of the NSW Governments Plan for Aboriginal Affairs: Education, Employment and Accountability. This strategy outlines the key initiatives to be implemented across NSW Public Sector to implement strategies to achieve improvement in aboriginal employment (PSC, 2014).

The strategy includes an aspirational target of 1.8% salary band increase across all classifications by 2021.This target is in response to the current "pyramid effect" of aboriginal employment, whereby the highest numbers of staff are employed in the lowest salary bands. It is this aspirational target that has inspired the exploration of Aboriginal Professional development within OEH and the subsequent thinking around Workforce Capability to enhance and support career development and progression for Aboriginal staff.

OEH Employment Statistics –Overview

Currently the Office of Environment and Heritage employs 3,241 full time and casual staff, compromising a gender breakdown of 56.1% male and 43.9% female, with a median age of 46 years. In 2015 Aboriginal staff levels within OEH account for 10.13% or 347 employees (255 permanent and 92 casual) well above the COAG target of 2.6% (See Table 1) (Office of Environment and Heritage [OEH], 2014).

Table 1

OEH Trends in the Representation of Workforce Diversity Groups 2012-2014

Workforce diversity group	**2012**	**2013**	**2014**	**Benchmark/ target**
Women	40.8%	41.0%	41.0%	50%
Aboriginal and Torres Strait Islanders (ATSI)	11.0%	11.0%	10.8%	2.6%
People whose first language spoken as a child was not English	7.8%	7.7%	7.8%	19.0%
People with a disability	4.0%	3.8%	3.5%	N/A
People with a disability requiring work-related adjustment	1.2%	1.1%	1.1%	1.5%

Source: Office of Environment and Heritage Annual Report 2013-14, p.105. (Public Document)

Table 1 shows the benchmark COAG target of 2.6 % for ATSI employment has been exceeded, while the benchmarks for women of 50% and staff whose first language is not English of 19 % has not been reached.

Although the employment benchmark for Aboriginal employment has been exceeded, deeper examination of employment circumstances for the cohort reveals a disconcerting pattern. The salary for the majority of Aboriginal staff falls well below the OEH mean. Average salary for Aboriginal staff is $69,436 per year versus $88,640 per year – the average for all other OEH staff. Aboriginal salary also compares unfavourably to the salary of all other diversity groups within OEH. OEH staff with a disability average $90,144 per year and staff whose first language is not English average $94,528 per year.

Table 2 highlights this pattern by examining the Distribution Index of Diversity groups within OEH. The Distribution Index of 100 indicates that the centre of the distribution of the Workforce Diversity group across salary levels is equivalent to that of other staff. Values less than 100 mean that the Workforce Diversity group tends to be more concentrated at lower salary levels than is the case for other staff. The more pronounced this tendency is, the lower the index will be. In some cases the index may be more than 100, indicating that the workforce diversity group is concentrated at higher salary levels.

In 2014 Aboriginal staff had a Distribution Index of 73 indicating that the majority of staff are clustered in the lower salary levels. In sharp contrast to Women with a Distribution Index of 108. Interestingly people with a disability who require work related adjustment, possess a Distribution Index of 114, indicating that this cohort is clustered in higher salary bands (OEH, 2014).

Table 2

OEH Distribution Index: Trends in the representation of workforce diversity groups

Diversity Group	2012	2013	2014	Benchmark
Women	107	106	108	100
Aboriginal and Torres Strait Islanders	71	73	73	100
People whose first language spoken as a child was not English	107	107	107	100
People with a disability	104	106	106	100
People with a disability requiring work-related adjustment	114	113	114	100

Source: Office of Environment and Heritage Annual Report 2013-14, p. 105 (Public Document)

NB: The Distribution Index is not calculated where workforce diversity group or non-workforce diversity group numbers are less than 20.

OEH diversity strategies are working; employment for Aboriginal people is exceeding government targets; unfortunately, however, equitable representation of Aboriginal staff across all bands is still to be realised.

The disparity in salary banding is clearer when you examine the employment positions of Aboriginal staff across OEH (See Table 3). In table 3, the salary bands are matched back to the clerical based equivalent, for ease of Public Sector tracking. As can be seen from table 3 the majority of OEH Aboriginal staff are employed in positions below a salary range of a Clerk 5/6 equivalent, with the largest cohort of staff currently sitting in the salary band of $57,256 per year.

Table 3 highlights that Aboriginal staff are underrepresented in senior roles within OEH, with only 4% or 16 Aboriginal staff members holding senior management positions equivalent to Clerk 11/12/Senior Officers (Middle Managers).

Table 3

OEH Permanent Employment Positions for Aboriginal and Non Aboriginal Staff across all Salary Bands.

Salary Band	Band Equivalent	Aboriginal Staff in Band	Total Staff in Band	% Aboriginal Staff in Band
<$57,256	General Scale equivalent	78	281	27.8
$57,256 $64,008	Clerk 1/2 equivalent	67	488	13.7
$64,008 $75,559	Clerk 3/4 equivalent	29	294	9.9
$75,559 $86,868	Clerk 5/6 equivalent	26	503	5.2
$86,868 $97,883	Clerk 7/8 equivalent	24	353	6.8
$97,883 $113,212	Clerk 9/10 equivalent	15	603	2.5
$113,212 $170,250	Clerk 11/12/Senior Officers (Middle Managers)	16	398	4.0
$170,250 $242,801	Band 1 Executive	0	53	0
$242,801 $305,401	Band 2 Executive	0	10	0
$305,401	Band 3 Executive	0	3	0
Total		255	2,986	8.5

Source: Mr Arginovski, OEH (personal communication, August 26 2014)

*Salary bands used are those as set out by the PSC for future tracking and reporting. They match back to the Clerk Grade classification

Recruitment within the Public Sector

Workforce planning within the Public sector is a priority under the new Government Sector Employment Act 2013 (GSE Act). Under section 63 of the act the head of a Government Sector Agency is responsible for incorporating Workforce diversity into workforce development. The GSE Act also allows for government departments to employee “eligible persons” which allows for the advertising of identified positions. An identified position can be restricted for certain priority groups (i.e., Aboriginal people). In addition, other “eligible persons” may include the disabled, people under 25 years and people disadvantaged in employment (i.e., identified cultural groups). Identified positions are usually utilised for lower level positions and are not offered at management and senior management roles.

The Government Sector Employment Act outlines how employees are selected at recruitment. The act utilises the Public Sector Capability Framework which outlines the skills and behavioural characteristic that are required to fulfil a position within any government agency. The framework clearly states the prescriptive skills and behavioural characteristics required for the role. In addition, the occupational specific requirements for middle management and senior management roles require educational qualifications at a tertiary level.

Salary Band Progression

OEH actively encourages people from all diversity groups to apply for roles. In 2014/2015 financial year 4.4% of all candidates were Aboriginal, securing 8.7% of the roles available. The majority of roles secured by Aboriginal staff were for Aboriginal identified positions within National Parks and Wildlife Services (NPWS).

Within OEH Aboriginal, staff usually choose to work in specialist targeted roles that provide services to Aboriginal people and communities interacting with OEH. Aboriginal staff bring their unique capabilities to such roles, but there is potential for more Aboriginal staff to bring capabilities to other roles within OEH that they may not have previously considered. The majority of roles that Aboriginal staff occupy within OEH fall in a salary band below clerk 5/6 or equivalent. Although workplace requirements for a 5/6 clerk equivalent calls for adept people skills and occupational knowledge, the role requires only a minimal formal qualification, vocational Certificate III being the most commonly held qualification within this salary band. As the salary bands increase, the tertiary qualifications to support the position become a prerequisite. Moving from a lower salary band to higher salary band will therefore be impeded if formal educational qualifications are not held by the applicant.

To determine if current Aboriginal staff seek progression to a higher salary band requires a detailed assessment, not undertaken in this paper. However what can be ascertained is the workplace motivational level of Aboriginal staff, which is reflected in their involvement in workplace professional development.

Professional Development

OEH Aboriginal staff across all salary bands (n=347) are actively engaged in workplace learning and development. In the financial year 2014/2015, 62 % or 216 Aboriginal staff enrolled in at least one professional development activity. The 216 Aboriginal staff who undertook training engaged in 644 individual training events, each person averaging 3 training events per year.

Upon examination of the non-Aboriginal cohort n= 3241, 83% or 2894 staff enrolled in at least one training event. Interestingly, however, this cohort engaged in 5014 individual training events averaging 1.8 training events per year. Examinations of the nature of the training events reveal they can be broadly classified into Occupationally Specific Training[3] and Personal Development Training[4.] When examining the nature of the training events undertaken by Aboriginal staff across all salary bands, 495 or 76% of the training events were Occupationally Specific and 149 or 23 % were of a Personal Development nature.

For the majority of Aboriginal staff the choice of occupationally specific training indicates a commitment to professional workplace development and job maintenance while the personal and behaviour development activities may signal a desire for professional extension and possible career advancement. A significant trend is seen for Aboriginal staff who are classified as senior officers, above the salary band Clerk 11/12/Senior Officers (Middle Managers) who selected Personal development training 81.5 % of the time and occupationally specific training only 18.5% of the time.

Clearly Aboriginal staff across all salary bands are actively engaged in training. Their engagement in individual training events is double that of non-Aboriginal staff.

Measuring Management Capability

In 2015, OEH engaged in a large scale needs analysis to determine manager capability. MANAGECAT®, a self-assessment capability analysis tool (CAT) was utilised to analyse individual skills and knowledge and to gauge individual's needs for professional development. A total of approximately 700 managers were invited to participate in an on-line survey with 342 managers completing the task. Of the 342 managers who completed, 11 managers identified as Aboriginal.

The survey revealed that 10 of the 11 Aboriginal Managers have only been in a management role in the public sector for three (3) years or less. With only one female Aboriginal Manager being in the Public Sector for greater than 3 years. The length of service for this cohort indicates that Aboriginal Managers are a new and emerging

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[3]Occupationally specific training includes Fire Preparation Day, Senior First Aid, Chainsaw-L2 Basic Fell, Aircraft Safety 4-Wheel Drive, Chemical Handling, Winch / Hover Refresher, Firearms Training.
[4]Personal and professional development training includes Resume/Interview Skills, Writing Well at Work, Workplace Bullying, OEH: Merit Assessment Program, Respectful Workplace Manager, Respectful Workplace Staff, Dealing with Aggressive Situations

management group and that they are not moving from other management positions within the Public Sector.

The results of the capability assessment across all management skill clusters were evaluated. The Capability Analysis revealed low management skill perception within the Aboriginal Manager cohort. The MANAGECAT® capability analysis results revealed that Aboriginal Managers perceive their own ability as lower than non-Aboriginal Managers across nearly all management capability areas. A summary of the most significant features of the analysis appear below:

- Of the 29 skill clusters evaluated, 28 skill clusters were rated lower by Aboriginal Managers
- Only one skill cluster was rated higher by Aboriginal Managers – i.e., *Managing Team Direction*
- Only one skill cluster was rated equal by Aboriginal Managers **-** *Managing Diversity and Culture*
- Aboriginal Managers scored themselves significantly lower (20% lower) than non-Aboriginal Managers in eight areas of management capability. Management areas included:
    - ❖ Managing workplace development
    - ❖ Managing business operations and plans
    - ❖ Managing financial resources
    - ❖ Managing technology
    - ❖ Managing change
    - ❖ Managing professional practice
    - ❖ Managing professional development
    - ❖ Managing procurement and contracts

The low self-rating by Aboriginal Managers may reflect their lack of Public Sector management experience and/or indicate a need for professional development.

Conclusion

Aboriginal employment within OEH sits predominantly at the lowest salary band levels, lower in fact than all other equity groups across OEH. Moreover, perceived impediments to salary progression may include lack of formal qualifications, for lower band levels, and poor self-perception amongst Aboriginal managers.

There is an imperative to review workplace planning and improve career mobility for Aboriginal staff and to equip aspiring managers with the skills they require to compete for career positions in an open merit based recruitment process.

OEH has exceeded the COAG target for Aboriginal employment; however, there is still work to be done to achieve the NSW Public Sector Aboriginal Employment Strategy

2014-2017 imperative of a 1.8% increase in Aboriginal employment across all salary bands.

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SO MUCH MORE THAN A HUMBLE HALL: WORLD WAR ONE MEMORIALS IN NSW SCHOOLS OF ARTS & MECHANICS' INSTITUTES

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ABSTRACT: This paper outlines the important role that School of Arts and Mechanics' Institutes played in the story of Australian adult education and highlights their significance in acknowledging those members of their local communities who had served in World War One, in honoring who had fallen, and in stressing the great cost of war to the community.

Keywords: history of adult education, mechanics' institutes, community war memorials

Last year the world marked the 100th anniversary of the outbreak of the First World War (WW I) in August 1914. This year marked the 100th anniversary of the landing at Gallipoli of the Australian and New Zealand Army Corps [the ANZACS] on April 25th 1915. By the end of the First World War there were very few people in the countries that took part, who remained unaffected. The war reached out and touched almost everyone's life in some way or other. Children grew up in the shadow of battle, their fathers absent or lost. Women were mobilized in unprecedented numbers. The vast majority of these women were drafted into the civilian work force to replace absent men or to work in greatly expanded munitions factories. Thousands more served in the military mostly in support roles but some saw action as nurses. The destruction unleashed by the first really modern war resulted in previously unimagined losses. Over 9 million soldiers died as a result of the fighting. Food shortages, sometimes inflicted by blockades and sometimes resulting from failed harvests, weakened the people who remained on the home fronts. Nearly 6 million civilians died from disease or starvation. Almost one million more were killed as a direct result of military operations. In all, the estimate of dead directly resulting from the war stands at over 16 million.

Australia and the War

Though those at home in Australia were spared much of the more brutal collateral damage suffered by those on whose lands the war was actually fought, the Australian war casualties were really quite horrendous. Remember that the Australian population at that time was approximately 4.9 million people. Around 420,000 Australians volunteered for service in the war, representing almost 40 per cent of the male population aged between18 and 44. Of that number, 335,000 embarked for active service, 60,284 died and 155,133 were wounded in action. At 65 per cent, the **Australian casualty rate**

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[1]Association of Mechanics' Institutes and Schools of Arts [AMISA] website: http://amisa.org.au
contact: http://amisa.org.au/contact-us

(proportionate to total embarkations) was among the highest of any nation, which took part in the war.

Landmarks in Adult Education

In their book, *Landmarks in International Adult Education: A Comparative Analysis*, the Editors, Charters and Hilton, present accounts of landmark initiatives in adult education in eight countries. All of these "landmarks" share the following characteristics, which also constituted the criteria for their selection:

- each addressed successfully a significant learning/social issue
- each demonstrated a particular appropriateness to its own specific context
- each served a population of significant numbers
- each has been judged as having been successful in meeting the needs of their communities and learners
- each embodied a fairly simple idea, which had self-evident credibility

The initiatives chosen on the basis of the above criteria and their national homes were as follows:

- Study circles Sweden
- Folk High Schools Denmark
- Workers' Universities Yugoslavia
- The Workers' Educational Association United Kingdom
- Frontier College Canada
- Cooperative Extension United States of America
- People and Culture France
- Volkshochschule Germany

In many ways, the Landmarks described are the product of the societies and cultures in which they operate and they all deliver similar adult learning outcomes for their participants. While all nations, to a lesser or greater extent, have implemented adult educational provisions for their inhabitants and that while, in each nation, a range of models and approaches have been used, it appears that in each nation there can be identified one prototypical approach that has become synonymous with that nation. It is this paper's contention that if *Landmarks in International Adult Education: A Comparative Analysis* had included another chapter, an Australian chapter, then the Australian landmark in adult education would have been the School of Arts or the Mechanics' Institute movement.

Schools of Arts/Mechanics' Institutes

At the time of WW I there were some 800 plus Schools or Institutes in the state of NSW and perhaps some 3000 Australia-wide. They operated under a variety of names:

- School of Arts
- Mechanics' Institute
- Literary Institute
- Workingmen's Institute
- Miners' Institute
- Railway Institute [and there was also a Tramways Institute]
- Postal Institute
- Athenaeum
- Lyceum
- Temperance hall
- Free Library
- Memorial Hall
- Public Hall
- Soldiers' Hall
- People's Institute

In this paper the general term "Schools and Institutes" will be used.

Their Origins

Schools and Institutes were originally voluntary organizations, which had as their major objective the diffusion of scientific and technical knowledge, through the establishment of libraries, the organization of technical classes, the presentation of public lectures, the maintenance of collections of technological models and scientific materials, and the holding of industrial fairs and expositions. Schools and Institutes have long been recognized as having been among the very earliest providers of formal adult education. Within a decade or so of the formation in the early 1820s of the original Scottish institutes, there were Schools & Institutes in all parts of the English-speaking world.

The First Wave

All these early Schools and Institutes [which may be described as the "first wave"] placed a heavy emphasis on intellectual and technological goals. They saw themselves as providing for the scientific/technological education of mechanics <u>and</u> the moral uplift of the working classes. However, almost everywhere, most of these "first wave" Schools & Institutes failed to thrive. Except for that handful that evolved into well-known universities, colleges and libraries. A NSW example is the Sydney Mechanics' School of Arts [1833] which through its Working Men's College was the parent of the NSW Technical and Vocational Education system and the grandparent of two universities. As a result of this "failure to thrive" many observers of adult education have cast the Schools & Institutes movement, as a whole, in the role of glorious failure. This has been done largely on the basis of the claim that they had failed to achieve their stated purposes, in that:

- They had not succeeded in promoting the mental and moral improvement of the working classes.
- They had not educated the mechanic in the scientific principles underlying his trade

The Second Wave

However, an examination of the stories of the later Australian Schools & Institutes, which were built in the late nineteenth and early twentieth centuries, supports the long held view that there was indeed a distinct and quite different "second wave" of Schools and Institutes in Australia. These Schools or Institutes, despite their name, had little to do directly with the scientific/technological education of the artisan class as their aims were:

> *The mental and moral improvement and the rational recreation of the members through the establishment of a library and reading room, and by the provision of lectures, the formation of classes, the maintenance of recreational facilities, and by such other means that seem desirable to the Committee. [New Lambton Mechanics' and Miners' Institute Constitution 1902]*

They did, however, have a lot to do with providing, a local home, no matter how modest, for reading, adult learning, culture, civic action, recreation, and entertainment. These Schools and Institutes provided crucial social infrastructure in numerous suburbs and towns: often predating the arrival of local government. They, in modern terms, built social capital in their local communities. Consult any local community history and you will more than likely find that: the first local church service; the first picture show, concert or play: the first public meeting; the first court sitting; and the first Council meeting all occurred in the local School or Institute Hall.

The Spread of the Second Wave

As the nineteenth century ended and the twentieth century began, there was a shift of population from the rows of rented inner city terrace houses to the new owner occupied detached cottages of the suburbs spreading along the newly developed rail and tram lines. At the same time, as a result of the government's closer settlement policies in many rural areas and as new mining areas were opened up, a number of new towns and villages were established. In almost all of these new suburbs and towns, there was soon built a School or Institute. The records of many of these Schools and Institutes are far from complete. However, the one event, in their lives, that is very well documented, in almost all cases, is the ceremony at which the School was officially opened. From the detailed newspaper reports of these ceremonies it can be seen just how significant these events were in the lives of their communities. Senior, as well as local, politicians were in attendance, often the Premier, sometimes the Governor as well or instead of the Premier, usually the Minister for Education, local clergy, and the local Mayor and Aldermen.

How did Communities use their Schools or Institutes?

The local School or Institute soon developed as a comprehensive provider of educational, social, cultural, and recreational services to its local community. Although the story of each is different and to some extent unique, it is possible to present a generalized list of the ways in which communities used their Schools and Institutes.

- Education - Some Schools and Institutes provided basic education classes for illiterate adults, other Schools provided the local venue and organization for University Extension lectures, and of course, many class groups, both publicly and privately organized, used the halls and classrooms, and a few halls even served as temporary public schools or annexes to the local high school or technical and further education college.
- Libraries - Before Municipal Libraries, the Schools and Institutes were the only local public libraries. This was their most important function [many even renamed themselves as Literary Institutes]. Though they had basic reference sections and most took a broad selection of Australian and even some overseas newspapers and magazines for the reading room, the schools mainly catered for recreational reading. They were essentially libraries of popular fiction.
- Meetings - A full range of lodges, social clubs, political parties, women's organizations, and community groups used the Schools' and Institutes' facilities to conduct their affairs. Often one of the meeting rooms was specially equipped and reserved solely for Lodge Meetings.
- Working Class Political Life - Many suburban and some rural Schools and Institutes provided a significant local resource for the then infant working class movement. Labor Electoral Leagues and Women's Suffrage groups used the facilities of the Schools, as did the unions, as well as the benefit societies and the fraternal lodges. Further, their libraries, as well as stocking popular fiction, offered the standard works of contemporary Socialist thought while their Debating Clubs explored radical topics. Finally, their lecture programs helped to popularise the ideas of Marx, Darwin and Huxley and promoted a belief in the inevitability of progress.
- Theatrical - Amateur dramatics, professional performances and cinematic extravaganzas all took place in the School's or the Institute's main hall.
- Civil Society - Civic functions, public meetings, and sometimes, until a town hall was built, even the municipal council met in the School or Institute as did the local court, and often the local MP maintained his/her electoral office on the School's or Institute's premises.
- Religious - The Schools' or Institute's facilities were not only used by secular bodies, many churches held their services in the Schools'/Institutes' lecture halls while awaiting the completion of their own purpose built premises. However, this traffic was not all one way. Some Schools and Institutes operated from church halls until they had accumulated enough funds to build/buy their own premises.
- Emergencies - the Schools and Institutes were often local centers for relief during floods and bushfires. As late as 1950s, thousands of children were immunized against polio in the local Schools or Institutes halls.

- Billiards - played a major role, almost all Schools and Institutes had one table and some had more than six. Though some condemned billiards [and some Schools/institutes never had billiard tables], Sir Joseph Carruthers, Premier of NSW made a famous speech in support of the role of Billiards when he opened the Miranda School of Arts. In this speech, he stressed both the recreational and fund raising role of billiards in the life of the Schools and Institutes. It should also be remembered that the Schools'/Institutes' billiards halls [and other games and smoking rooms] were just about the only place that working men could meet and relax in an alcohol-free environment
- Social Functions - both public and private - were held in the School's or Institute's hall; there were concerts, recitals, balls, dances, fetes, bazaars, flower shows and art exhibits for a range of public purposes, and, of course, wedding receptions, engagement, twenty-first, golden weddings, retirement and other private parties were events that made the School's rafters ring.
- Companionship - We should not forget the value that the Schools & Institutes contributed in providing opportunities for companionship. As John Woolley, Professor of Classics and first Principal of the University of Sydney, said, at the opening of the Wollongong School of Arts in 1861, "*I am so firmly convinced that the habit of meeting is itself a priceless good that it would be worthwhile to come if only to shake hands and go home again."*

The Project

By the time of the First World War, the Schools/Institutes movement in NSW was at its peak both in terms of number of Schools/Institutes and the level of their activity. These Schools and Institutes had little to do with the scientific or technological education of the artisan class. They, however, had a lot to do with providing, in the then new suburbs and towns, a local home, no matter how modest, for reading, learning, culture, civic action, recreation, and entertainment. Further, these Schools and Institutes provided a real social focus to the lives of the inhabitants of these suburbs and towns; a focus sorely needed, given the almost complete absence of any other local social infrastructure.

It was with this context firmly in mind that it was decided to collect, to collate and to publish on the AMISA (Association of Mechanics' Institutes and Schools of Arts - NSW) website, the details of WW I memorials which are in or co-located with a School or Institute in the state of New South Wales. The Schools and Institutes reported to have such memorials were contacted requesting details and pictures of such memorials. Robert Parkinson and Roger Morris were principally responsible for collating and compiling the useable replies that were received. Melanie Ryan was largely responsible for the preparation of the website. In the gathering of material for the website a variety of sources of information were used. These sources included (in addition to the responses received directly from the Schools) contemporary newspaper reports, local histories, local studies librarians, and local historical societies. In the interests of conciseness and readability, these sources have not been specifically footnoted. However, the work of all researchers and photographers is gratefully acknowledged.

Schools of Arts/Mechanics' Institutes and the First World War

During the war, soldiers were fare welled and welcomed back home in the local School or Institute hall. Patriotic and fundraising events were held in the hall. Groups met in the local School or Institute to knit socks, to knot camouflage nets or to pack "comfort" packages for soldiers serving overseas and prisoners of war. Moreover, in many localities, the School or Institute was the only public building beside the local public school. Therefore, many of the local War Memorials or Rolls of Honor, at the end of the War, were located in and/or co-located with the local School or Institute. Finally, because of an outpouring of patriotic fervor and local pride some Schools or Institutes were renamed as the Soldiers' Hall and some new Schools of this period were built as Soldiers' Memorial Schools of Arts. The following are some examples of the ways in which local communities used their schools and institutes to remember/honor those who had served the nation in WW I.

The Bellingen Memorial Hall and Literary Institute was formally opened on ANZAC Day, April 25th 1929. The first plans to build such a fine building were mooted in 1918 but the struggle to raise the necessary funds was long and difficult. The fund raising efforts used included operating a regular open-air cinema, sale of the original School of Arts building, and pledges from local citizens. Today this useful building continues to serve its community as a venue for local concerts, touring performers, exhibitions, festivals, movies and regular adult education classes.

After WW I the citizens of Bingara decided to build a new Soldiers Memorial Hall attached to the existing School of Arts. This new building, which opened in 1922, provided, as well as the hall, a library, a reading room, a meeting room, and a card and billiards room. It housed for many years the local picture show. As time passed and other more specialized public buildings were erected, the use of the School of Arts and Soldiers' Memorial Hall declined. Eventually, the building was transferred to the local Municipality. The Soldiers Memorial Hall is now Municipal Head Office.

The Cowra School of Arts and the Soldiers Memorial Hall, erected in 1920, was demolished in the 1960s to provide the site for a new veterans' club house. The pair of Memorial Gates erected in 1920 to honor those who served in WW I are all that remains of the original buildings.

The Delegate School of Arts dates from the early 1900s. Today, the building features a Local History Museum, a Woodworking Room and an exceptionally fine hall. As well as the Honor Rolls, that flank the stage in the auditorium, there is co-located at the front of the building an impressive stone monument that commemorates the "Men from Snowy River March" when 12 men set out on 6 January 1916 to march the 220 miles to the nearest recruitment post gathering volunteers along the way to serve in the Great War.

Some 40 men from Gundy volunteered for and served in WW I; of these eight were killed. In July 1921 a meeting of returned servicemen was convened with the object of raising funds to finance the building of a Soldiers' Memorial Hall to remember the fallen.

Over the next two years fund raising activities, were vigorously pursued and the Hall opened in 1923.

The Moree Soldiers' Memorial Hall is an impressive and very useful community resource designed in the classic style in keeping with the dignity of its purpose. The Hall is entered through a spacious portico, in which are placed the Honor Rolls, with the names cut in granite. The names of those who made the supreme sacrifice are on a separate tablet from that which records those who served. Today, some 92 years later the Memorial Hall continues to serve its community.

Shortly after the end of the First World War local residents of the tiny village of Pleasant Hills, to honor those who had served in the war, installed in their local Literary Institute a rather unique and very touching Honor Roll: a small hand painted map of Australia with names of those local men who had served painted onto it.

After World War I it was decided to erect in Scone a new building, the Soldiers' Memorial School of Arts, to replace the existing School of Arts. The new School and the Memorial Arch were unveiled in1924. The Soldiers' Memorial Arch only contains the names of those who did not return from their war service. Later, at the local hospital, when a War Memorial Children's Ward was built, a memorial was erected there that contained the names of all who enlisted from Scone.

The Seaham School of Arts Hall contains three WW I memorials: a set of memorial gateposts, a community Honor Roll, and a Roll of Honor unique to a lodge that regularly met in the hall. Moreover, the walls of the 1902 hall are lined with photographs of 17 of the 20 locally enlisted soldiers. These photographs provide a unique visual memorial of faces frozen in time. These are not the faces of celebrity soldier/heroes, just ordinary men: farm hands, a butcher, dairy farmers and a horse-breaker. They gaze back over the years. Age has not wearied them. Six of these 20 volunteer soldiers died on war service

The West Wyalong School of Arts was built in the 1880s. It was demolished in 1923 in order to build a fine new community resource, the Sailors and Soldiers Memorial Literary Institute. At the opening of the new building, the Chairman stressed that the new building had not been built to glorify war but to remember those who had fallen, to honor those who had served, to remind people of what our "boys" had done and to emphasize the great cost of war. Today the building is still serving its community as the town's Community Health Centre.

The Woodville School of Arts has two WW I memorials. The original Memorial lists all those who volunteered for service in the war. The more recent Memorial lists those volunteers who paid the supreme sacrifice.

Like many schools of arts at that time, the Wyalong School of Arts was originally erected towards the rear of its lot, the long term plan being that when times were better a much more impressive front section could be added. In 1921, this happened when the new Soldiers' Memorial Hall was added at the front. Erected in memory of those who served in World War One, the Memorial Hall featured two marble tablets: one tablet lists all those who had served and the other records those who had died in the service. The Soldiers' Memorial Hall continues to serve its community as the home of the local FM Community Radio station.

Glorious Failure or an Australian Success Story?

While they may not have achieved their original goal of providing a comprehensive scientific/technological education for the artisan class, the Schools and Institutes were not glorious failures as many critics have claimed. They can only be regarded as failures if one agrees with the view of those who are focused on formal statements of goals and purposes and on the absolute imperative of reforming the moral depravity of the working classes. Then the Australian Schools' and Institutes' billiard tables, libraries of popular fiction, light entertainment, lowbrow lectures, useful classes, and regular social dances can be seen as blatant examples of this tragic failure.

One of the earliest and greatest supporters of the Schools and Institutes movement was Sir Henry Parkes, serial Premier of NSW and father of the Australian Federation, who liked to say that: Australians are *"a practical people and have little affection for the ideal or the imaginative; and we are rather proud of this deficit in our national character".* From this point of view the Schools and Institutes can be seen as being most successful in that they were able to meet the very real practical needs of their local communities. In so doing, they created some thousands of multipurpose community centers across the nation. In many rural towns and city suburbs, the Schools and Institutes have provided important educational, social, civic, and recreational services to their local communities. They were the proto-typical adult education provider for much of Australia and most Australians.

This is a much more accurate and positive assessment of the role of the Schools & Institutes in Australia's cultural and social life. As such, they were the real landmarks [in both a physical and a cultural sense] of Australian adult education – landmarks much loved by their users and remembered with great affection by so many older Australians.

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Material collected by the research project, "World War One Memorials In Schools Of Arts &Mechanics' Institutes." A variety of sources of information, both written and human, were used. These sources included (in addition to the responses received directly from the Schools) contemporary newspaper reports, local histories, local studies librarians and local historical societies. In the interests of conciseness and readability, these sources have not been specifically footnoted. However, the work of all researchers and photographers is gratefully acknowledged.

The authors' knowledge of and experience with the School of Arts movement.

As such it lacks the formal footnotes and references of more usual an academic paper. However, there are a number of papers, written by the principal author, which deal with the content and the issues raised in the paper. A listing of those most relevant to this paper follows:

Morris, R. K. (1999, November). *Australia's oldest adult education provider: The Sydney Mechanics' School of Arts on the occasion of its 165th birthday'* Paper presented at the meeting of AAACE National Conference, Freemantle, Australia.

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IMPLICIT ATTITUDES OF INTERNATIONAL AND AMERICAN ADULT STUDENTS TOWARD BLACK AND WHITE TEACHERS

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ABSTRACT: The purpose of this study was to examine hidden prejudice in two groups of adult students, international and American, against black compared to white teachers. Social desirability in the minds of participants may affect the result of a study involving racial bias (Mullins, 1982). For this reason, the researchers created a computer protocol using the standard Implicit Association Test (IAT) to measure the implicit attitudes of participants. The IAT relies on the idea of automatic information process within the mind that is not impacted by social desirability. A clear concern in education is that the racial bias toward minority students will let those implicit biases affect the way they teach those students, creating a self-fulfilling prophesy of poor student performance. But the implicit bias can work both ways and can impact a teacher's effectiveness. Traditional racial prejudice theories usually looked at white's attitudes toward blacks and other groups. This study had a significant directional shift by focusing on the international students' racial attitudes toward black and white teachers. The implicit racial attitudes of international students were also compared to those of American students. The result and evaluation of this study may be a valuable tool to improve student services and teacher professional development in higher education. Suggestions for future research are also provided.

Keywords: Implicit Association Test, teacher preference, international students, racial prejudice

The number of international students enrolled in public and private U.S. colleges and universities in the 2012-2013 academic year was nearly 820,000 (National Center for Education Statistics, 2013). Most of the international students come from non-English speaking countries and many are required to take language courses before they become culturally and linguistically ready for regular college courses. Most also come from societies that are much less racially diverse compared to the U.S. For many recently arrived international students, their prior exposure to American culture primarily came from media outlets in their own countries or internet. Given that international students, especially the newly arrived, usually have not had enough interactions with the different racial groups in the US society, they will likely be guided by stereotypical beliefs about those of these racial and ethnic backgrounds. At the same time, due to language limitations and social desirability, international students might not be comfortable in

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describing their racial attitudes. Thus, indirect assessment of their racial attitudes with limited command of their English language will likely be more suitable. In this study, researchers used the Implicit Association Test (IAT) to determine the implicit racial

preference of international students to the images of black and white teachers. Initially, the researchers sought to find out how international students from different cultural backgrounds and belief systems perceived black compared to white teachers. Subsequently, American students were included in the study to get better perspectives. This study was guided by four research questions:

Question 1. Do international students have built-in stereotypes against black and white instructors?
Question 2. Do American students have built-in stereotypes against black and white instructors?
Question 3. Are the perceptions toward black and white instructors different between international and American students?
Question 4. Is there a gender difference in the implicit attitudes toward white and black teachers?

Theoretical Framework

This study was theoretically based on elements of intergroup contact theory and acculturation theory. Allport (1954) proposed intergroup contact theory and claimed that prejudice between two group members could be reduced through intergroup contact. Acculturation refers to the process of cultural and psychological change that happens as a result of contact between two or more cultures and individuals (Berry, 2005; Gibson, 2001). Over the years, acculturation theories have evolved and become quite complex and confusing (Ngo, 2008). However, numerous research studies have been conducted to examine the process of cultural interaction, its outcome, and acculturation. The focus of early studies were mainly on the adjustments and adaptations to the dominant culture made by immigrants (Ngo, 2008; Van Acker & Vanbeselaere, 2011). The basic supposition of these theories is that people tend to have more prejudice against groups with which they are unfamiliar. Prejudice declines, however, as they become more familiar with these groups through interaction and acculturation. The American public has seen this change on a broad scale as the racial attitudes of white Americans have softened since the civil rights movement of the sixties increased the contact and interaction between different racial groups.

For this study, the researchers also relied on the underlying theory strength of the Implicit Association Test (IAT) (Greenwald, McGhee, & Schwartz, 1998) to actually measure the attitudes and beliefs of participants that they would probably not express openly or even realize they hold, such as their racial prejudice. The IAT systematically predicts real, personal, important, and clinically significant outcomes… especially in the domain of racial prejudice and stereotyping (Greenwald et al., 1998; Greenwald, Poehlman, Uhlmann, & Banaji, 2009; Nosek, Hawkins, & Frazier, 2011). It measures hidden bias of participants from their response reaction time, called latencies in the IAT. The IAT assesses the beliefs of individuals by measuring differences in one's reaction time towards paired stimulus. Suppose a person is presented with (a) the combination of a picture of a flower and a word beautiful, or (b) the combination of a picture of an insect paired with a word beautiful. If a concept of 'flower is beautiful' is congruent with his/her established beliefs, it will require less time for an individual to recognize that combination. The IAT protocol measures these underlying automatic associations in milliseconds.

Method

This research used a quantitative design to investigate the implicit preference of international and American adult students toward black and white teachers. The study was approved by the Institutional Review Board (IRB) and conducted in 2013 and 2014 at a large urban university in southeastern region in America. In this study, adult referred to an individual whose chronological age was 18 years and older. International students were defined as foreign students who were enrolled in an English language program at the university mentioned earlier. The American students were undergraduate students who were enrolled in the College of Education at the same university.

Sample

The total number of participants was 83 (N=83) with 49 international and 34 American students. They were convenient samples of student volunteers. The international students (N=49) were attending an English institute affiliated with a large urban public university in the Southeastern region in America. The institute classified their students into five English proficiency levels, level one to five, level five being the most proficient. The participants of this study were level four and above students: 13 females and 36 males. The average age was 22 years, average length of stay in U.S. 2 years, and average length of time learning English before arrival to the U.S. was 2.4 years. The self-rated familiarity with American culture before coming to the U.S. was 2.8 on a Likert type scale (1=Not familiar at all to 5=Very familiar). Most of the participants were from the Middle East (19) and China (11). The remainder were from South Korea (4), India (3), Japan (2), Vietnam (2), Venezuela (2), Kazakhstan (2), and 1 each from Ukraine, Chile, Togo, and Turkey. The international students did not receive any compensation for participating in the study.

The American students (N=34) were undergraduates who were enrolled in the College of Education at the same university. They were elementary or secondary education majors with various subject areas. When this study was conducted, the students were taking educational psychology course. The data were collected over two semesters in 2013 and 2014. There were 25 females and nine males. The average age was 23 years. The racial representation of the American students was white (21), Latino (6), African American (3), Asian (2), and biracial (2). Religious affiliation was Christian (18), Buddhist (1), other (3), and none/agnostic (2). The participants received extra credit for volunteering for this study.

Instrumentation

Two instruments were used to collect the data: a demographic survey and the computer-based Implicit Association Test (IAT).

Demographic survey. The demographic survey for the international students was computer-based. An IAT batch file was created and added to the IAT protocol. The survey for international students had ten questions: gender, date of birth, country of origin, religion, arrival date to US, English proficiency level, length of English learning, self-reported familiarity of American culture before arriving at the U.S., and the medium of learning American culture. The demographic survey for the American students was in paper-and-pencil format. The survey for the American students has seven questions: gender, date of birth, program, major, year in college, ethnicity/race, and religion.

The Implicit Association Test (IAT). The computer-based IAT was used to understand the perceptions of international and American students' racial attitudes toward black compared to white teachers. Based on the standard IAT protocol, the researchers created a computer program to access the established stereotypes of students toward black and white teachers. The researchers used picture and text stimuli to detect the associative strength between two targets (black and white teachers) and two attributes (positive and negative attributes). As alluded to earlier, people tend to react faster to stimuli pairs that are congruent with their built-in beliefs. The program recorded the reaction time in milliseconds and the reaction latency was used in data analysis.

The IAT protocol for this study included 16 picture stimuli and 16 text stimuli. The picture stimuli included 16 pictures of eight black instructors (four females and four males), and eight white instructors (four females and four males). The images were carefully screened to balance factors other than race between the two groups. Dress, facial expression, background, and size of image were considered in selecting them. The researchers designated the pictures of eight white teachers as *Target A* and eight black teachers as *Target B*. The text stimuli included 16 descriptors. They were eight pairs of positive and negative attributes that expressed productive and counter-productive teacher behavior conducive to students' learning: attractive/ugly, caring/indifferent, friendly/unfriendly, knowledgeable/ignorant, patient/impatient, prepared/lazy, professional/unprofessional, safe/dangerous. The researchers designated eight positive attributes as *Attribute A* and eight negative attributes as *Attribute B*. The researchers also designated hypothetically compatible pairs: Target A (white teachers) - Attribute A (positive attributes) and Target B (black teachers) - Attribute B (negative attributes).

Procedure

Each participant completed the computerized task on a laptop provided by the researchers in a quiet room. To measure the participants' implicit racial attitudes towards black and white teachers, stimuli that included pictures and texts were programmed to appear on the upper left or upper right of the computer screen for a very brief time. As picture or text stimuli appeared, participants responded by pressing the E key (positioned on the left side of the keyboard) if the stimulus belonged to the category on the upper left side. Participants responded by pressing I key (positioned on the right side of the keyboard) if the stimulus belonged to the category on the upper right side. This information was included in the verbal task instructions for the IAT given to participants before they started the task. Participants were also instructed to place their index or middle fingers on E and I keys on the computer keyboard when they were ready to begin. The average time to complete the demographic survey and the IAT was about ten minutes.

Data Collection

The demographic survey and IAT was administered in one session. The IAT was administered on a laptop computer with the Windows Operating System to run Inquisit v.3.0 software. Three laptop computers were used to collect data. Three researchers administered the IAT in a quiet place. The data were collected in a 12-month period in 2013-2014. After the participants completed the task, the IAT data were transferred to the primary researcher's password-protected computer immediately. The data on the other computers were deleted. The demographic survey forms were stored in a locked file cabinet.

Data Analysis

The administered IAT test results in *D*-score (Greenwald, et al., 1998). The score describes the direction and magnitude of one's preference. The higher the *D*-score, the stronger the association between the hypothetically compatible parings (Greenwald, Nosek, & Banaji, 2003). The range of the *D*-score is -2 to +2. In this study, zero indicated no preference for black or white teachers. Positive score indicated that the participants associated Target A (white teachers) with Attribute A (positive attributes) or Target B (black teachers) with Attribute B (negative attributes). Negative score indicated that the participants associated Target A (white teachers) with Attribute B (negative attributes) or Target B (black teachers) with Attribute A (positive attributes). The IAT scoring algorithm shows that the *D*-score of 0.65 (either positive or negative for all the *D*-scores) as indicating a strong preference, between 0.65 and 0.35, a moderate preference, between 0.35 and 0.15, a slight preference, and the score between -0.15 and 0.15, no preference.

Table 1
Descriptive Statistics of IAT D-Score for American and International Students

	American students	International students
n	34	49
M	0.1971	0.3613
SD	0.4793	0.4731
SV	0.2443	0.2238

Note. SV = sample variance.

Table 2
Independent t-test of IAT D-Score between American and International Students

Pooled variance	0.2321
Hypothesized mean difference	0
df	81
t-statistic	-1.5268
P(T<=*t*) one-tail	**0.0653**
t Critical one-tail	1.6638
P(T<=*t*) two-tail	0.1306
t Critical two-tail	1.9896

Results

The IAT results suggested that the international students who participated in this study have shown very moderate implicit preference to white teachers compared to their black counterparts (M=0.36, SD=0.47). This finding suggested that international students might have already formed some concept of racial hierarchy within the US society. American students have shown a slight implicit preference for white teachers (M=0.20, SD=0.48). The independent *t*-test was conducted to find out if there were any significant statistical differences in the perceptions toward black and white instructors between international and American students. The result revealed significant difference at the .10 level of significance indicating that international students associated black teachers with negative attributes more than American students.

The researchers also conducted independent *t*-tests for international female and male students to examine gender differences. Interestingly, international female students tended to have a weaker bias towards black teachers than male students (M=-0.22 for females and M=0.41 for males, *t(47)*=-1.317, *p*=0.097) although they were not different in familiarity with the US culture or language proficiency level. The findings indicated that American female students also showed a weaker bias toward black teachers than male American students. The independent *t*-test to compare the implicit preference of all female (*n*=38) and male (*n*=45) students toward black and white instructors were insignificant: t(81)=-2.36, *p*=0.01).

Concluding Remarks

Much research has been done to explore the existence and level of racial or cultural prejudice the international students faced in their host country. However, research on the attitudes of international students about various racial groups in their host country is very rare. Earlier studies on racial attitudes are based on the traditional racial prejudice theories that look at white's attitudes toward blacks. Recently, the shift to understand the racial prejudice in multi-racial context has been salient. The racial attitudes of immigrants especially those of Asian and Latino toward blacks and whites have been notable (Kim & Roth, 2013). The value of this study lies in that directional shift from white's attitudes toward other groups to the attitudes of newly arrived group. From a theoretical perspective, this study may contribute to the testing of elements of intergroup theory and acculturation theory. From a practical perspective, the results and evaluation of this study may be a tool to improve international student services and teacher professional development in higher education. It may also contribute to the progress of implicit cognition and formation of racial prejudice.

The researchers anticipate that the difference of implicit preference toward black and white instructors between international and American students will emerge as significant with larger samples. How and why females formed less bias than males towards an unfamiliar group was rather counter-intuitive. The consistency across students of different cultural and political backgrounds was also intriguing and deserved more extensive research from multiple perspectives.

Do recently arrived international students from countries with few citizens of African descent come to the US with pre-conceived prejudices against African Americans, specifically African American teachers? If that is so, could that be due to their lack of direct interaction or due to their exposure to stereotypical images of race from media in their home countries? To understand the complex nature of racial stereotypes and inner workings of the mind, more interdisciplinary research is needed.

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DESIGNING AND IMPLEMENTING NEIGHBORHOODS OF LEARNING IN CORK'S UNESCO LEARNING CITY PROJECT

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ABSTRACT: Cork, the Republic of Ireland's second most populous city, is one of 12 UNESCO Learning Cities globally. Becoming a learning city requires a sophisticated audit of education, learning and other socio-economic indicators. It also demands that cities become proactively engaged in delivering to the objectives set by the *Beijing Declaration on Building Learning Cities* which was adopted at the first UNESCO International Conference on Learning Cities in Beijing (2013) and the *Mexico City Statement on Sustainable Learning Cities* from the second conference in Mexico City (2015). The UNESCO learning city approach lays heavy emphasis on lifelong learning and social inclusion. In addressing these two concerns Cork city is piloting the development of two Learning Neighborhoods. The pilots are a collaboration between the City Council, University College Cork and Cork Education and Training Board who will work with the learning and education organizations and residents in each area to promote, acknowledge and show case active local lifelong learning. This paper looks at the context and design of these Learning Neighborhoods.

Keywords: Learning City, Neighborhood Learning, UNESCO, Cork

Cork: A UNESCO Learning City

Cork City was granted the UNESCO Learning City Award at the second UNESCO International Conference on Learning Cities in Mexico City in September 2015. A total of twelve cities were granted the award viz. Melton (Australia), Sorocaba (Brazil), Beijing (China), Bahir Dar (Ethiopia), Espoo (Finland), Cork (Ireland), Amman (Jordan), Mexico City (Mexico), Ybycuí (Paraguay), Balanga (Philippines), Namyangju (Republic of Korea) and Swansea (United Kingdom). The Mexico conference was a follow-on from Beijing in 2013 at which the *Beijing Declaration on Building Learning Cities* was adopted. That declaration promotes inclusive learning, family, community, and workplace learning. It advocates the extension of learning technologies, excellence in learning and lifelong learning. It also addresses citizen empowerment, social cohesion, economic prosperity, cultural promotion and sustainable development (UNESCO, 2013).

The *Mexico City Statement on Sustainable Learning Cities* renews the Beijing agenda and emphasizes harnessing lifelong learning for citizen empowerment and solidarity; safeguarding the environment; citizen health awareness; inclusive economic growth; promotion of social, economic and political inclusion; and encourages cross-sectoral and cross-community engagement (UNESCO, 2015, pp. 3-4).

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In the bidding process University College Cork became one of the four key partners in the Cork learning city initiative. In line with the requirements of the UNESCO process Cork City Council is the lead, but in July 2015 it signed a memorandum of understanding to advance the UNESCO Declaration on Building Learning Cities with University College Cork, Cork Institute of Technology and Cork Education and Training Board. Cork City began the formal process towards becoming a learning city through its 2014 decision to formally adopt the UNESCO Beijing Declaration. Soon after a Steering Group was formed, called Growing Learning in Cork (GLiC) which includes representatives of the signatories of the memorandum and a range of other public and civil society partners, including private citizens. Cork City had initiated processes going back to its 2002 adoption of the *Imagine Our Future* strategy and the establishment in 2004 of Cork's Lifelong Learning Festival, which is run annually and now has more than 500 individual events. Progress towards becoming a UNESCO Learning City was greatly enhanced through Cork's membership of PASCAL International Exchanges (PIE). Through its engagement with PASCAL it became an active adopter of EcCoWell (Ec = ecology and economy; Co = community and culture; Well = wellbeing and lifelong learning), which is a flexible, reflexive platform that allows cross-community engagement over wide diversity of fields. The EcCoWell approach is similar to some of the key sentiments of the Mexico Statement and complements the objectives of the Beijing Declaration.

Within the UNESCO Learning Cities project University College Cork through the Centre for Adult Continuing Education (ACE) entered a partnership with Cork Education and Training Board, with the support of Cork City Council to engage with and support two city neighborhoods to develop 'Learning Neighborhoods.' This is aimed at supporting residents in local communities, to award good practice in promoting learning and to provide incentives for neighborhoods to improve and develop learning. Cork City launched its participation in Learning Neighborhoods at the Cork Lifelong Learning Festival in March 2015.

Learning Neighborhoods

The first case studies/pilot projects in Cork will involve Knocknaheeny on the northside of the city and Ballyphehane on the southside of the city.

Knocknaheeny is one of the most deprived city communities, in an area of the city with persistent socio-economic issues. The extent of educational disadvantage on Cork's northside has been the subject of multiple reports over an extended period. As recently as 2014 the *Cork City Profile* states that there is a "distinct spatial component to educational disadvantage in the city" (Kelly & Hayes, 2014: p. VII). Across the northside of Cork City, a significant part of the population has no formal education beyond primary or lower secondary levels. Although proportions of those educated to upper secondary are generally on a par with both Cork City as a whole and Ireland nationally, education at technical, vocation and certificate levels and degree level are far lower. For example, in Cork City, 15.2 per cent of the population have a technical, vocational or certificate qualification, which is more than double the proportion in several northside electoral divisions such as Farranferris B (7.3 per cent), Gurranabraher A (7.4 per cent), and Fair Hill B (7.9 per cent). There are particularly low levels of the population aged 15 and over educated to degree level or higher in Farranferris B (3.5 per cent), Knocknaheeny (4.7 per cent), Fair Hill B (5.2 per cent) and Gurranabraher A (5.3 per cent). This is far lower than Cork City and national averages of close to 25 per cent or of more affluent areas in Cork city centre and the southside of the city such as Knockrea A (part of Blackrock) and Bishopstown A, where half of the population have a degree.

Historically Ballyphehane was also a community with significant socio-economic and educational disadvantage. It is now a more stable and settled community, with a higher than average rate of older people compared to Cork city as a whole. However there are still persistent issues. Edwards and Linehan (2005) report that it was among a cluster of communities in the south side of the city with 50 per cent rate of the population "whose education has ceased, left school at 16 or under" (p. 40), and it is also comparable with Knocknaheeny and other deprived areas of the city where "a quarter to a third of the population in these areas over the age of fifteen finished their education at Lower Secondary Level" (p. 38). Ballyphehane however, has stronger community networks, a more mature community infrastructure and is making significant educational advances.

The Learning Neighborhoods project officially began in September 2015. It will test ways of building sustainable Learning Neighborhoods that could then be applied in other neighborhoods of Cork, with potential replication in other cities. It will report on progress mid-way through the first year pilot at the 2016 Cork Lifelong Learning Festival.

The Centre for Adult Continuing Education (ACE), University College Cork and Cork Education and Training Board operate in partnership to coordinate the Learning Neighborhoods award/program. They will assist the two community education networks to apply to become Learning Neighborhoods and support their projects. This involved modest funding to develop promotional material, handbooks, flags/signs/stickers; the appointment of a staff member based in UCC to coordinate the award/program, support the networks, and assist in the evaluation of the action plans.

In designing the model of delivering Learning Neighborhoods the team drew from the *Schools for Health in Ireland* program: *Developing a Health Promoting School*. This program is inspired by global trends including "the World Health Organization (WHO), UNICEF, UNESCO, the US Centers for Disease Control and Prevention (CDC) and the International Union for Health Promotion and Education (IUHPE)" (Health Service Executive, p. 3). The model also took cognizance of the success of the Cork Lifelong Learning Festival, which through its open approach to learning activities has built a vibrant program that gets engagement from grass roots levels up to major institutions like University College Cork and Cork Institute of Technology. Thus, the definition of a Learning Neighborhood is broad and aims to facilitate an ongoing process that is sustained over time. The working definition adopted by the Cork team is:

> *A Learning Neighborhood is an area that is constantly strengthening its practice in learning, providing a diversity of learning opportunities for the whole*

population through partnership and collaboration.

The team consulted with Peter Kearns of the PASCAL International Observatory, and incorporated a number of specifics based on that consultation that will require the attention of these neighborhoods during the first year.

1. *Partnership*: The success of the pilots will depend substantially on the range and quality of the partnerships that support these projects.
2. *Co-ordination of effort*: Success will also depend on how well the contribution of partners is coordinated, across a range of dimensions including health and well-being, learning, culture, environment, creativity and so on.
3. *Communication:* This will be fundamental. Residents in the pilot neighborhoods should be encouraged to participate and contribute and kept informed throughout the year such as through a newsletter and social media. Regular progress reports also given to all the partner organizations; an example of good practice is provided by the Hume Global Learning Village.
4. *The hub role:* Much can be gained if a well-located institution takes on the hub role as the centre of promotion, development, and assessment of the project. This is being filled by ACE at UCC.
5. *Learning audit:* An initial activity of the directing group will be to undertake a "quick and dirty" learning audit to gain an overview of the learning resources and needs of each neighborhood. This is likely to depend on inputs from the relevant parties although there could also be value in holding several community forums where community member could bring forward their views.
6. *Objectives for the pilots:* The learning audit and associated consultations and research should enable the directing group to set some specific objectives for the pilots, desirably with key performance indicators where appropriate. The objectives should be things that are achievable in the time frame of the pilots although longer-term objectives could also be identified. It is suggested some relatively small projects that could be part of the pilot stage e.g. an intergenerational learning activity; innovative learning for pre-school age; innovative learning example from second level; new learning project in the community in a non-traditional context e.g. a supermarket, an open green space etc.
7. *Assessment of outcomes:* Planning for the pilots should also include how the outcomes of the pilots will be assessed. This should include the community role, the views of partner organizations, and the report of the directing group to Cork City Council.

Learning Neighborhoods Model

There are several parts to the model of *Developing a Health Promoting School* that will be drawn on for Learning Neighborhoods and it is proposed to develop a Handbook to outline the process in a clear and accessible way, addressing the following aspects:

1. Introduction to Learning Neighborhoods:
   - What are Learning Neighborhoods
   - What are the aims and benefits
2. The Learning Neighborhoods model:
   - Key areas and themes for action
3. The Learning Neighborhoods process:
   - The stages involved in becoming a Learning Neighborhood
   - How long the process takes
   - How the network should be constituted, how often they should meet etc.
   - How is recognition granted and what happens afterwards
4. Appendices:
   - Criteria
   - Agreement form
   - Action plan guidelines and template
   - Application form for recognition
   - Self-reflection template

In the program/award documentation, the broad-based definition of a Learning Neighborhood will be followed by a definition of learning (e.g., all forms for all ages) and the context for the program. This will include giving the neighborhoods a sense of connection with the wider city and also with the global context of Cork as a UNESCO Learning City. The aims and benefits of engaging in A Learning Neighborhoods could also be broad and should highlight why it is important for an area to engage. Examples are provided below.

Possible Aims:

- Foster learning in the community
- Celebrate, highlight and showcase activities in the community.
- Raise awareness of opportunities for learning in the neighborhood
- Develop new initiatives, e.g., including those hard to reach

Possible Benefits:

- Better learning outcomes
- Enhance networking and support among those active in learning in the neighborhood.
- Support planning, implementation and evaluation of action plans

A Learning Neighborhood handbook will outline possible areas for action. For example, the Health Promoting School model outlines four key areas for action including environment (physical and social), curriculum and learning, policy and planning, and partnerships. They state that whatever health-related topic or theme that a school decides to work on, which will be determined following a period of consultation, should then be related to each of the four key areas. This gives schools a set of criteria for their action plan, which is implemented over an agreed timeline.

There are eleven stages in becoming a Health Promoting School, not all of which would be applicable to Learning Neighborhoods, as illustrated in Figure 1.

The handbook for Learning Neighborhoods will include an action planning template. In the Health Promoting School Model, they ask that the plan include the following:

- The themes that the team will work on, the main aims and what is hoped to be achieved
- Why this is important and which aims are prioritized
- The tasks/actions that will be carried out under the four key areas, who will carry them out, when, and what resources are needed

Following the implementation, there is quite a detailed application form for recognition as a Health Promoting School.

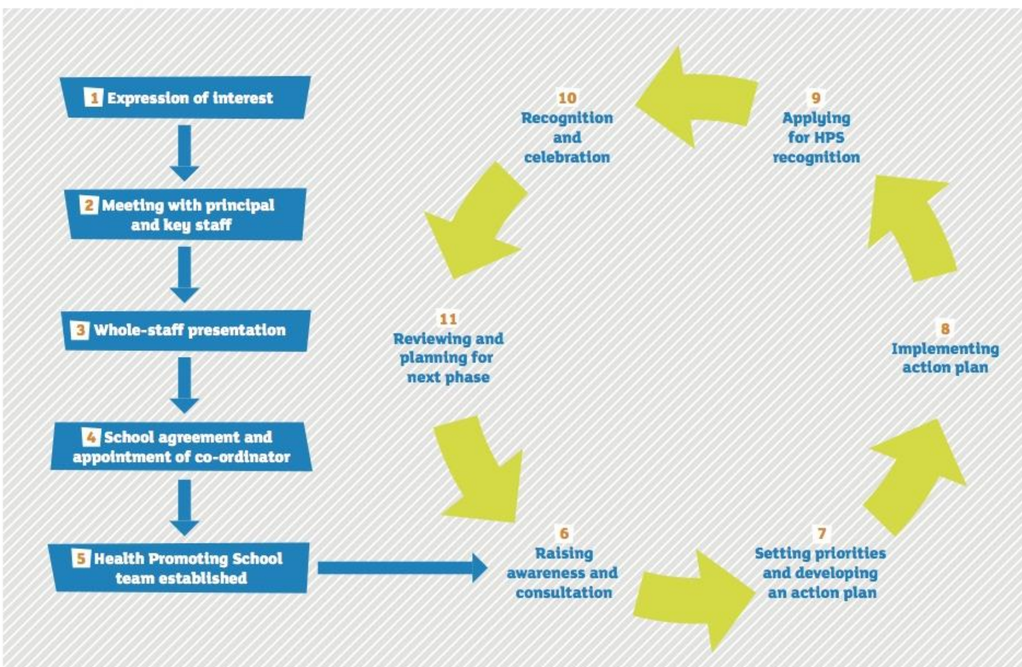

Figure 1, Stages in the health promoting schools process (Health Service Executive).

As this is a Case Study, it is the team's intention to learn from each step during the year and from the experiences of the two communities. The Learning Neighbourhoods process and documentation will involve the communities developing an action planning template that will include:

- The themes/focal points for the plan, based on the groups experience and their brief evaluation of learning in their neighbourhood (the 'quick and dirty' learning audit advised by Peter Kearns).
- The aims (what is hoped to be achieved and why) and actions (when, who, what resources are needed) for the year.
- The plan for monitoring throughout the year and at the end of the process.

At the end of the Learning Neighborhoods process, the networks/groups will reflect on what worked well, what could have been done differently, and actions to continue the work and to share best practice with other communities.

The coordinator will support the networks/groups that apply to take part in Learning Neighborhoods at all stages of the process: from initial involvement, development of action plans, through to evaluation (e.g. site visits and meetings with the neighborhood teams) and recognition as a Learning Neighborhood.

Conclusion

The Cork team faces significant challenges in developing a model of Learning Neighborhoods. There is strong commitment at community level for the initiative, but there is a strong disparity between the capacities of the two neighborhoods. Ballyphehane has a stronger base and longer history of community level success than Knocknaheeny. Statistically both communities seem similar, but there is a far higher level of population transition in Knocknaheeny and it is a much newer, younger and less settled community. It will be important that the communities can learn from each other, try to achieve their goals, but not to engage in negative or competitively driven comparison. It will be important to emphasize that the neighborhoods can both achieve success, while not being carbon copies of each other.

Another level of challenge will be to get engagement between different education and learning actors in the communities. The school system can be quite formal and at second level can become focused on the state exam system. Other actors, including libraries and community centers, while having an outward facing ethos are very often operating with very constrained resources. Pushing the concept beyond the formal and informal learning community will also be a challenge. However, both communities have networks/groups in place that are enthusiastic about engaging in the process. These groups support the Learning Neighborhoods program as vehicles to make the Learning Cities commitment more local and more beneficial for citizens. These groups also hold that rewarding good practice will revitalise learning in their communities towards building a culture of lifelong and lifewide learning.

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LEARNING LIVES OF NORTH KOREAN YOUNG DEFECTORS: A PRELIMINARY STUDY OF RECONSTRUCTING IDENTITY IN CAREER DEVELOPMENT

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ABSTRACT: This study of eleven young North Korean Defectors (NKDs) examines how they engage in daily learning focusing on the process of identity reconstruction through their attempt to engage in career development activities. For the purposes of this paper one case was selected to illustrate how a reconstructed identity is learned. The main research questions for the study were: a) how do young NKDs reconstruct their identity in career development activities? and b) how do young NKDs learn through the identity reconstructing process? This research was based on a Cultural-Historical Activity Theory and data were analyzed by adopting a theory-driven approach. For data analysis, open, focused, and axial coding was conducted. Conclusions are preliminary, as the analysis is ongoing.

Keywords: North Korean Young Adult Defectors, Identity Reconstruction, Career Development, Sociocultural Learning, Cultural-Historical Activity Theory

Young Adult North Korean Defectors and Career Development

Since 1990, the number of North Koreans defecting to South Korea has risen steadily. Since 1998, North Korean defectors (NKDs) in their 20s and 30s now constitute a majority of NKDs. Young adult NKDs are a growing population among NKDs in the South and a distinctive group. They were born in the 1980s and 1990s, right before or shortly after the collapse of the state-socialist economy, an era of marketization and eroding state relevance in the North (Haggard & Noland, 2011; Park, 2013). According to the report of Ministry of Unification (2015), they occupy 57.8 percent of the 27,247 entire NKDs who entered South Korea in 2014. They were children and teenagers in the era following the death of Kim Il-sung in 1994. It was an era when North Korea began to be dramatically transformed, described as marketization from below (Haggard & Noland, 2011; Lankov, 2012; Park, 2014).

These younger adult NKDs have characteristics distinct from the previous NKDs who have memories of a monolithic state-controlled society. This younger generation shows less respect for the regime and has experiences of a market economy in the form of the North Korean black market or in a third country where they passed on their way to the South. These characteristics lead them to the need of a different type of successful career development beyond merely adjusting to South Korean society. An important learning process, then, is reconstructing their identity through participating in career development activities (Kim, 2013; Park & Oh, 2011). Thus ongoing involvement in career development activities becomes a key concern.

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Since young adult NKDs grew up in a society centered on emerging marketplaces, they are often called '*Jangmadang* Generation' or 'Black Market Generation.' They have no personal memory of the days under Kim Il-sung. Unlike the previous generation who remembered a monolithic state-controlled society under the leadership of Kim Il-sung, the social and historical backgrounds make NKDs consider the regime more as an obstructer than a provider (Haggard & Noland, 2011; Lankov, 2012; Park, 2013). They show less respect for the government compared to previous generations and do not care as much about *Juche* or socialist ideology. Rather, smuggled foreign media exert more influence on their beliefs and attitudes (Kretchun & Kim, 2012; Park, 2013). Outside media and information are smuggled in via DVDs and USBs from China and transacted at the private black market. They watch South Korean movies, K-pop videos, Hollywood movies, and even World Wrestling Entertainment (Kretchun & Kim, 2012; Park, 2013, 2014). Exposure to the foreign media and information about other societies impacts the younger generation's attitude and beliefs about the outside world in a favorable way (Kretchun & Kim, 2012). They no longer believe that their nation is rich, realizing that South Korea is significantly advanced economically. This is substantially different from their parents' and grandparents' generation who had believed that the outside world was inferior in all important regards to Kim Il-sung's realm (Lankov, 2012).

Problem and Purpose Statement

Although the increase of young adult NKDs is noted socially in South Korea (Haggard & Noland, 2011; Lankov, 2012; Park, 2013, 2014), few studies have been conducted regarding the issue of their career development. Moreover, given that the young NKDs participate in diverse state sponsored career development activities, (Park & Oh, 2011; Yoo, Bae, Jo, Kim, & Choi, 2013), it becomes important to begin to understand how career identity is shaped and how young NKDs learn to reshape their identity.

This study of eleven NKDs examines how they engage in daily learning focusing on the process of identity reconstruction through their attempt to engage in career development activities. For the purposes of this paper one case was selected to illustrate how a reconstructed identity is learned. The main research questions for the study were: a) how do young NKDs reconstruct their identity in career development activities? and b) how do young NKDs learn through the identity reconstructing process?

Method

The larger research project is a study of eleven young adult NKDs in South Korea. Purposeful sampling was used (Creswell, 2007; Lincoln & Guba, 1985) and data were collected through semi-structured interviews, participant observations in young adult NKDs' daily activities, and archival analysis (Creswell, 2007; Fetterman, 1998). Interviews mainly asked about their past life before coming to South Korea, first experiences in South Korea, current daily life and future plans. All interviews were transcribed and all participant observational content was recorded in field notes. This research was based on a Cultural-Historical Activity Theory and data were analyzed by adopting a theory-driven approach (Boyatzis, 1998). For data analysis, open, focused, and axial coding was conducted (Charmaz, 2006). Conclusions are preliminary, as the analysis is ongoing.

Identity Reconstruction as Sociocultural Learning

Unlike the concept of personality, considered as a natural given or determined biologically, identity is human-made from participation in social practices (Sfard & Prusak, 2005). As the social context in which an individual lives changes, identity is reconstructed and recreated. In other words, when people experience a changing social context, self-identity becomes less stable; self-identity is called into question over time. This leads individuals to construct and reconstruct their identity. In this sense, identity can be one of the outcomes constructed and reconstructed activities from participating in activities within social contexts (Roth, et al., 2004). Also, identity is fundamentally not static but continuously evolving and changing under the influence of social contexts that involve individuals on a daily basis (Foucault, 1979; Hall, 1990),

Perceiving identity not as a static entity but as a process which is constantly evolving in social practices allows one to concentrate on 'doing' their identity within a specific social context. Namely, by focusing on the ways of interaction with sociocultural factors, the notion of identity can be illuminated. Shifting the concept of identity from 'being' to 'doing' allows one to turn attention to how people interact with their daily living situations in examining identity (Duits, 2008; Giddens, 1991; Goffman, 1969).

A sociocultural perspective shows how human cognition develops by reflecting on the interactions between diverse social and cultural factors and individuals and it considers mind to be located in the individual-in-social-action. The basic concept of this perspective is to include the external conditions of life in which human beings live to explain the highly complex forms of human consciousness. Cognitive processes are subsumed in social and cultural processes and the person is constructed in a social context, formed through practical activity, and shaped in relationships of desire and recognition. The sociocultural perspective considers that self-consciousness arises not from the individual but from social relations with others and "the individual dimension of consciousness is derivative and secondary" (Vygotsky, 1979, p. 30). Thus, this perspective emphasizes social participation, the relationship and interaction with others, the settings of activity and historical change (Scribner, 1997).

From a sociocultural perspective, learning is situated and occurs continuously through collaboration between the person and the social context through cultural mediations, and is transformed within sociocultural history (Lave & Wenger, 1991). In particular, the sociocultural perspective of learning focuses on the interdependence of social and individual process in the co-construction of knowledge. The knowledge, however, includes not only intellectual aspects, but also knowing oneself, in a broader sense, knowing one's identity. In this way, realizing oneself, that is, the process of constructing identity is learning as a sociocultural phenomenon.

Since identity originates through daily activities and "experience of engagement" (Wenger, 1998, p. 151) in social practices, reviewing lived experiences and activities within daily life plays a critical role in understanding the concept of identity and examining the process of identity construction. Therefore, the sociocultural perspective that focuses on social interactions at living situations and activities suggests the initial step to examine the process of constructing identity.

A Cultural-Historical Activity Theory Analysis of One Case

For this pilot analysis, I selected one case: K. K, who was born in a northern province of North Korea. She grew up in North Korea and came to South Korea by herself. She quit school at an early age. After coming to South Korea, she began to study at an alternative school for NKDs. She passed all of the school's qualification exams for a year and eventually entered university. Now she is studying Korean education in a graduate school.

Finding Daily Activities for Identity Reconstruction

To find daily activities of K for identity reconstruction, we focused on her actions. The primary researcher pursued a perspective for seeing identity as process. Thus we were more concerned about what K was **doing** rather than what K's identity is. Actions in her everyday life were clearly revealed in interviews. Her actions were related to needs or desire that derives to objects in activities. Also, her actions with specific goals were converged to activities which have objects.

Theory-driven thematic coding was used (Boyatzis, 1998). The components of Cultural-Historical Activity Theory such as object, mediating artifacts, rules, communities, and division of labors (Engeström, 1987, 1999, 2001; Leont'ev, 1978; Sawchuk, 2003) were used in the coding process and the codes were collated into themes as one element in the activity.

Identity Reconstruction in Receiving Basic Education Activity

The first activity of K's identity-reconstruction is 'participation in basic academic education activity.' It is addressed by an object, 'to participate in basic academic education.' The object is from needs which are from the subject, K's personal experience and cultural historical elements.

Upon arrival in the South, K realized that there are educational programs specifically designed for NKDs. Under the South Korean government support system, she could begin to study if she wanted. This opportunity was in stark contrast to her previous living context; her living situations in her previous life in the North allowed little opportunity to pursue education. In the North, K had to quit school and, like other North Korean teenagers, had to engage in economic activity in order to survive. When K turned 18 years old, she was forcefully assigned to a job by the North Korean government, and on the way to defect, she had no choice but to work as a housekeeper in hiding at a house of an ethnic Korean living in China.

Regardless of K's needs or desire to learn, K could not be educated in her previous life. However, as K arrived in *Hanawon*, she realized that she could resume study through the education program of *Hanawon*. In actuality, for young defectors, *Hanawon* provides the program to study at an alternative school near *Hanawon*, while the adult class focuses on vocational training. At first K was assigned to the adult class because of her age—over 20 years old. However, she requested a shift to the youth class. Since South Korea is a credentialist-centered society where education is an important and basic element to live, the education regulation of *Hanawon* also reflects the sociocultural context, encouraging one to participate in academic education. As she stated:

> I quit studying when I was 12 years old. I studied until the age of 12 and I restarted to study after10 years. I consistently had the desire to study, but family circumstances could not support it. So as I began to study [in *Hanawon*], I craved to study continuously after I go out [*Hanawon*].

K began to study at the youth class in *Hanawon* with the objective of participating in academic education for itself. K wanted to study after going out of *Hanawon*. Thus, she decided to defer receiving a house from South Korean government for a year and lived in the dormitory of an alternative school. At the school, she prepared to take the elementary, middle, and high school qualification exams.

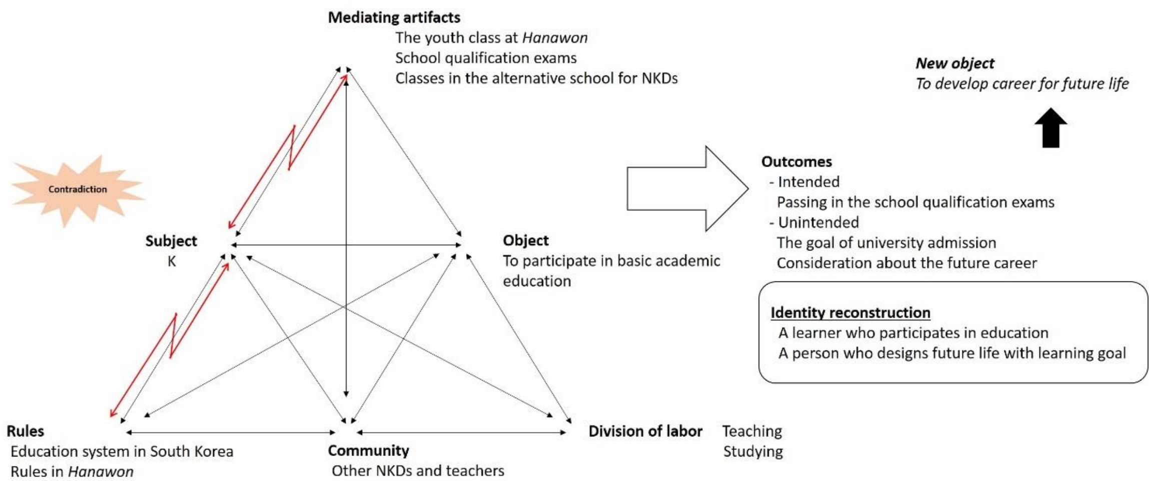

Figure 1. Participation in basic academic education activity system

When K began to study, she faced difficulties because of the different education systems between South and North Korea. The different school systems forced her to take the elementary school qualification exam, even though she graduated from the elementary school in the North. Also, except for mathematics, knowledge accumulated in the North was useless to prepare for the school qualification exams in the South. She had to learn almost everything from the beginning:

> I dropped out of the middle school after first grade in North Korea, but my level of education was just fifth grade of elementary school in South Korean education system. Since the final elementary school grade is sixth here, I had to prepare to take the elementary school qualification exam … At first, I began to study with my own desire to study, but I lacked assurance [to study continuously], because I hadn't studied for a long time and the South Korean [education] system was totally different from what I learned when I was young. Except for mathematic formula, everything was totally different. In particular, English was entirely all

> new and too hard. While I prepare for the elementary school qualification exam, I thought that if I failed it, I would quit studying and earn money.

Despite the contradiction between South Korean education system and her experience, she successfully passed the school qualification exams. While K is in the process of resolving this contradiction, she could specify her goal of learning and have opportunity to reflect and learn herself for designing future career.

At the beginning of participating in education, K had only the desire to learn itself. K, however, established the detailed goal of study; university admission. Also, she began to explore to plan her future career with what she will learn in university. She stated:

> As I passed middle school qualification exam, I began to think "Keep up mind and go to university!" From then, I considered about my career a lot. "What will I do?" I thought that the reason I study shouldn't just for going to university, but for doing something after university. This thought made me to consider the connection between what I want to do after university and what I do in university. "What will I do?" "What major do I have to study?" "What should I do study?" I agonized it too much. I spent around a year to decide it.

Within the participation in basic academic education activity, K reflected on her to plan career for future life. By participating in academic education activity in the South, her identity had been reconstructed to a learner from a manual worker who worked for survival. Initially her identity as a learner seemed like that of a passive education participant. Even though she participated in basic education willingly, she did not have any goals, plans or expectations to study.

As the contradiction between her previous experiences in the North and South Korean educational system in the participation in basic academic education activity, K faced difficulties. However, it eventually led to new opportunities for K to think about the purpose of her study. After K passed the middle school qualification exam, she began to reflect on herself and to consider her future life plan. Through the process of resolving the contradiction, K not only passed in all school qualification exams but also learned the need for setting a specific goal. Even though her initial objective to participate in education was just to achieve her longing to go to school in the activity, it was developed to design future life with specific learning goal. Within the activity, K's identities had been changed from a manual worker to a learner, and to a person who considers to design future life career.

Identity Reconstruction in Career Development Activity

As the outcomes of participation in basic academic education activity, K saw her objective as entering a university. This motivated K to take actions such as exploring herself, applying to universities, searching diverse career paths, entering a university, and transferring to a different university with an object, 'to develop career for future life.'

At first, K reflected on her previous life and her interest. However, it was not easy for someone who had never pictured a future life before. Moreover, she had lack of information about jobs in South Korea and people around her could not support and guide her career development well.

> I didn't know what I like and didn't know more what I can do. Actually I didn't know what I wanted to do. I had never thought about that kind of thing when I was young. My dream was just to survive without hunger. I just thought about it. So, I spent too much time to figure it out. And there was no one who could advise me. My mom was not there. As you know, I didn't have parents [at that time]. People around me at that time did also agonize about the similar matters and we did not know each other well, because we just began to know each other. So I did it by myself. My dad passed away under a very false accusation. So one point I wanted to be a lawyer. And my grandmother took seriously ill and passed away and it remained in my heart a lot, so I wanted to be a nurse. First of all, I just knew about a few jobs. I deleted one by one among what I want to do.

Through the agonizing process of establishing a career direction, K decided to be a Korean language and literature teacher. It was from reflecting about herself that K remembered that she liked to read books in her childhood. K applied to universities through special admission system for NKDs and finally received admission from a university. However, she realized that there is no teacher education program at this university after she entered. K transferred to another university in her junior year, but she could not take teacher education program there either. Juniors were not admitted to teacher education programs.

The lack of information about career and South Korean higher education system, led to a contradiction in her career development activity. This was a structural problem, due to the lack of understanding of the South Korean system of education. While NKDs receive information for career development in the South, the sociocultural and historical background did not prepare them to understand the structures and systems of the South. This is not a personal conflict but a structural contradiction. Like K, many of young adult NKDs who moved to new living situation do not have enough scaffoldings to thoroughly guide their career. Also, they are not familiar with actively searching information or finding someone who can help them to develop their own career, because they grew up in the different social context of North Korea, where their job and work are assigned. In actuality, after graduating the alternative school for NKDs and entering the university, K faced challenges of doing everything herself without others' guideline.

K began to consider entering graduate school, but it was not just for the career path to be a teacher. K designed her career to be a teacher first but while K took literature courses, a new issue had emerged. Taking courses, K perceived the differences in contemporary literature between the North and the South. She became concerned about the future of literature education in reunified Korea:

> While I studied Korean literature, I realized that contemporary literatures are totally different between the North and the South. It could not even be categorized within same genre as literatures. In the North, all of the literatures are praising thing. Introduction, development, turn and finally praising Kim family or loyalty to the government. Although the processes are a little bit different, the final conclusions are same. Then, if we are reunified, how can we teach literature? It is

impossible to teach North Korean literatures in South Korea but South Korean literatures can't be taught to North Korea directly when we are reunified. They not only can't understand them but also we should not teach them with one way. I was concerned those kind of things.

While K develops her future career goal within the career development activity, she realized the needs of preparing for a future reunited era in literature education field. Within the process of developing career plans by experiencing and resolving the contradictions, K learned the differences of educational contents between the North and the South and established her career goal to study North and South Korean literature education. At first, K was a person who planned the career path with the consideration of her own future. However, K learned to expand her perspective to design the career, connecting to the national issue. In this regard, K's identity had been reconstructed as an individual who made career plans with concern about future of the country in the activity. Also, K has confidence and pride in her work and herself as a unique person because of her career plan with the consideration of future reunited Korea:

The reason why I came to graduate school is apparent … I think I am the only person who can do it. It is not from pride, but… I think it is very necessary… Some people said to me that, "You struggle a lot but if Korea won't be reunified?" I don't care about the reunification within my lifetime even though my research always assumes the date after reunification, because it must be accomplished and after then, it is necessarily important part someday. Even though it won't be realized after the reunification, some of my friends who came to South Korea could be [educated] based on my research. If the North suddenly opens everything, the step [to prepare education for both South and North Koreans] definitely will be required, so I don't care about [achieving the reunification itself within my lifetime]… Sometimes I feel like I am too much idealistic but I just want to do it continuously. In the master's degree course, I realized that I don't know too much and I need to study more deeply … I really want to do the research that is needed.

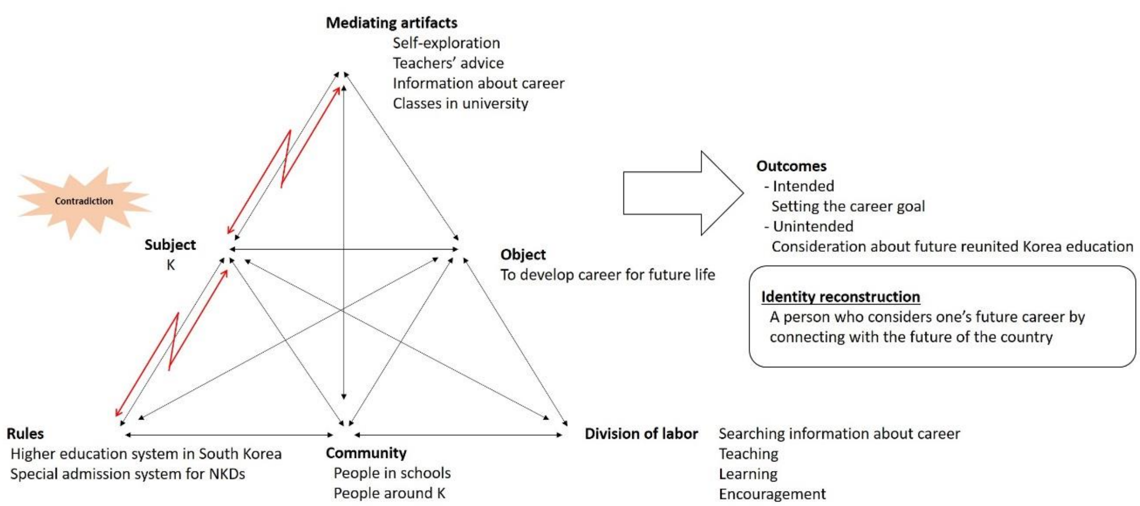

Figure 2. Career development activity system

Conclusions

By examining one young adult NKD's career development activities and processes, this study shows how she learned to reconstruct her identity in South Korea. The study's findings reveal the influences of her previous experiences before coming to the South and South Korean sociocultural and historical contexts to her career development activity. Regardless of her intention, her identity as a North Korean was given to her due to the distinctiveness as NKD's in South Korean society. However, she used the identity as a resource for recognizing herself and planning her future career. With the sense of duty and responsibility, she actively participate in career development activities to prepare for a future reunited Korea and she began to have pride of her own uniqueness as the only person who can do the work and certainty about the importance of her works.

While current discussions of NKD issues tend to see NKDs as a passive object of being adjusted to the South by emphasizing NKDs' challenges (Kim & Bae, 2010; Kim & Shin, 2014; Lee, 2012; Park, 2009), the study's findings showed how one young adult NKD reacted to the challenges and reconstructed their identity in career development activities as active subjects of social interactions in the South. In this sense, the study's findings provide meaningful suggestions to create a road map of career development for young adult NKDs as a driving force to achieve a reunified Korean peninsula. This study not only contributes in providing a broadened understanding about a new generation of NKDs but also offers ways to overcome prevailing negative perspectives about NKDs in the South.

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ANDRAGOGY THROUGH SOCIAL ENTERPRISE: ENGAGING STUDENTS IN THE LEARNING PROCESS IS BORDERLESS

Victoria Queen, Ph.D.[1]

ABSTRACT: Andragogy is the art and science of helping adults learn. As the number of college students classified as adults increases it is important their learning needs are met. The andragogical principles that frame this model describe how adult students need to know how, what, and why they are learning. Adults also possess the characteristics of self-direction, prior experience, readiness to learn, application orientation, and intrinsic motivation which distinguish the way they learn from traditional pedagogy. Social enterprise uses business methods and the power of the marketplace to advance an agenda; however, it is different from other types of business because the primary purpose is the common good. Social enterprise directly addresses a social need through products, services or employment of disadvantaged people. Social enterprise uses a triple bottom-line; measuring the good for people (staff/faculty, students, customers and community), the planet (environment), and profit (money generated or saved by the social enterprise activities). In the academic setting, social enterprise also measures programs (education, job training, and outcomes), thus reporting a quadruple bottom-line. The educator, acting as a facilitator or co-learner, can utilize the andragogical principles in helping adult students learn in a real-world social enterprise. A social enterprise should coexist with current programs or departments, and not cannibalize prevailing resources. Entrepreneurial activities that involve creative vision and practical market-based strategies should be considered. When start-up costs are not attainable, learning can also occur by helping students create a hypothetical social enterprises.

Keywords: andragogy, adult learning, social enterprise

Andragogy, derived from the Greek words *aner*, meaning "man" or "adult" and agogus meaning "leader of" is the art and science of helping adults learn (Knowles, 1980, p. 42). The term andragogy was first used in 1833 by a German teacher, Alexander Knapp (Nottingham Andragogy Group, 1988) to describe Plato's education theory. In 1926 the American Association of Adult Education was formed due to the persistence of educators such as Lindeman (Lindeman & Gessner, 1956), who was the first person noted to use the term andragogy in America.

Knowles revived the term andragogy and built an adult learning model including the principles of andragogy. The andragogical principles are designed to be used by empathetic instructors in a learning environment that is supportive, cooperative, and informal, where learners feel accepted and respected.

Adult students are not content to learn in the traditional pedagogical fashion. As avenues are explored to engage adult learners the social enterprise model has emerged as a practical solution. A social enterprise and its methods use business principles to solve a particular social problem, whether it be local, regional, national, or international (Durieux

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& Stebbins, 2010). Innovative solutions are executed to solve social problems, while helping adults learn, and possibly generate revenue at the same time.

Higher education has evolved due to the intertwined influences of demographic, social, and technological changes (Cross, 1981, p. 2). Since adult learning does not happen in a vacuum, the demographic, social, and technological changes affect what happens in higher education (Merriam, Caffarella, & Baumgartner, 2007).

Postsecondary education throughout the world is impacted by adult learners. In America, the number of students classified as nontraditional has steadily increased. Adult, or nontraditional, student enrollment grew by 65% from 1970 to 1990. At the turn of the twenty-first century, 73% of the higher education student population was considered nontraditional (National Center for Education Statistics [NCES], 2002). Nontraditional students are "students who are performing adult social roles and have one or more of the following traits: they are 24 years of age or older, may not have entered college the year they graduated high school, do not have the traditional high school diploma, may attend college part-time, work full-time, are financially independent, or have dependent children" (p. 3). In this paper the terms nontraditional and adult student are used interchangeably.

To address the learning needs of adult students, a starting point or set of assumptions is necessary (Kidd, 1959). Adult learning theories have attempted to fill the need. Emerging as model of how adult and pre-adult learners differ, andragogy recognizes the need for an environment that is conducive to helping adults learn. The andragogical principles, developed by Malcolm S. Knowles (1984) identify characteristics of adult learners that distinguish the way adult students learn from elementary, secondary, of traditional postsecondary students.

The principles of andragogy are:

- Need to Know: A unique characteristic of adults is that adults are willing to learn things they need to know due to the perceived opportunity cost involved in the learning process. Adults need to know the benefit of learning something and the negative effect of not learning it.
- Self-concept: Adults are self-directing and prefer to participate in the process of planning, implementing, and evaluating their own learning. Personal growth is at the core of adult self-concept and learning. Together, the learner and educator can set the learning atmosphere as they recognize needs, make goals, identify resources, implement strategies, and evaluate outcomes.
- Prior experience: Adults define themselves in terms of what they have experienced. It is important they can connect learning to their accumulation of experiences and knowledge. Techniques such as peer-to-peer activities, group discussions, problem solving, and laboratory methods use the student's prior experience.
- Ready to learn: Adults have a readiness-to-learn based on their social roles. Adults are ready to learn things they need to know as it applies to goals they want to achieve. The educator's role is to help the adult learners attain their goals.

- Application orientation: Adults are problem-centered and application oriented. They need practical application of knowledge using real-world situations. Successful education relates theory to practice.
- Intrinsic motivation: Adults are more intrinsically motivated to learn things that help them solve problems and result in internal payoffs. For them, the quality of life and self-esteem are stronger than external motivators. Intrinsic motivation is strong when adults know why they need to learn, and they have a choice in their learning process. To help adults learn, educators need expertise, empathy, enthusiasm, and clarity (Knowles, 1990, pp. 170-173).

The andragogical principles are focused on adult characteristics which distinguish the way adults learn. The strength of andragogy, when tailored to the learner and the situation, is that the principles can be applied to adult learning and "could be vital in responding to the expanding adult student body" (Knowles, 1973, p. 42).

Establishing an educational social enterprise employing the principles of andragogy necessitates the leader, department head or educator, to have expertise and a passion for the enterprise. Use of the andragogical principles requires educators to trust and empathize with the students (Knowles, 1990). The instructor should utilize a learner-centered process and accommodate learner uniqueness in planning and delivery of education (Henschke, 1989). When the instructor applies the principles of andragogy in the learning process, the unique characteristics of adult students will be recognized.

Andragogy contains some elements of behavioral, humanistic, transformative, and experiential adult learning theories. Andragogy is grounded in humanistic theory in describing how learners acquire and process knowledge. Using humanistic theory, Maslow's (1954) hierarchy of needs includes an individual's physiological, safety, belongingness and self-esteem needs that must be satisfied before the individual can reach growth fulfillment or self-actualization. The growth needs impact the principles of andragogy because it deals with the learners' need to know, aesthetic needs, and self-actualization; described as the "full use and exploitation of talent, capacity, and potential (Maslow, 1970, p. 150).

The heavy influence of humanistic theory noted, there are some shared elements of the behavioral learning theory with regard to practical problem solving, recognition of the abilities of individuals, attention to the range of skills of adults, importance on the evaluation process, and consideration of prior experience.

Andragogy also incorporates three themes of the transformative learning theory; experience, critical reflection, and rational discourse. Transformational learning is central to self-directed learning. It uses the learners' "frame of reference" (Merriam, 2008, p. 5) that relies on prior experience to develop a system of belief that leads to future achievement (Mezirow, 1996).

Andragogy through social enterprise uses three areas of cognitive knowledge generation identified by Jurgen Habermas (1970); technical, practical, and emancipatory. The technical area of learning is done through tasks that give the learner skills or competencies.

The practical area involves social interaction and helps the learners construct meaning of knowledge. The emancipatory area helps learners identify problems and understand options to assume responsibility for decision making.

Jack Mezirow (1981), took transformative learning, based on critical theory, and combined it with Knowles' andragogical theory to compile the Charter for Andragogy. He was of the position that the educator in an andragogical learning environment must establish mutual trust, decrease dependency, facilitate problem solving, and help the learner understand choices. The learner should be allowed to define and make decisions regarding learning needs, plan and evaluate learning objectives, use his or her own experience, and use the experience of others in the learning process.

Adult learning occurs from prior experience and through new frames of reference (Mezirow, 2000). A study modeled on the Charter for Andragogy utilizing the Andragogy in Practice Inventory instrument (Suanmali, 1981), found adult educators were in agreement on the core concept of self-direction in learning. By focusing on how adult students change their perspective as they learn, insight can be gained into the connections between vocation, commitment, and learning.

Andragogy through social enterprise employs experiential learning. The learner-centered approach prompts students' interaction with their education. Experience in education with a concern for linking experience with reflection, or understanding with doing, was promoted by Dewey (*Democracy and Education*, 1916). He proclaimed it was not enough to simply know something, because one cannot fully understand without doing. Dewey's continuity and interaction was a three-pronged experiential learning process that linked personal development, work, and education (Kolb, 1984). A feature of experiential learning is that motivation is intrinsic since action occurs at the beginning instead of the end of learning. In experiential learning there is a generalization from the experience to the principle being applied in other circumstances. Learning from experience is retained since the association with concrete actions is imbedded in the memory of the learner, not just associated with general principles or abstract symbols (Keeton, 1976).

Throughout history, educators of adults had distinctive techniques for engaging adult learners. The Hebrew prophets had words that meant learn, teach, instruct, guide, lead, and examples that suggests the use of andragogy in early times (Savicevic, 1999). The notable teachers of ancient history such as Confucius, Lao Tse, Jesus, Aristotle, Socrates, Plato, and Quintilian were all teachers of adults.

The early Hebrew teachers used the process of discovery and "learning by doing" (Knowles, 1973, p. 42). The case method was used where a situation was described in the form of a parable and the learners examined the characteristics for possible solutions. The ancient Greeks used Socratic dialogue, a problem-based learning, where the facilitator presented a problem and the students sought an answer by using reflection and drawing on their experience to get a solution (Knowles, Holton, III, & Swanson, 2005). Those teachers understood that adults learn through problem-solving and have the need and capacity to be self-directing (Lindeman & Gessner, 1956). At the same time the teachers in Rome used a confrontational method of learning where the group stated an opinion and defended it. The famous teachers of ancient times understood that adults had the capacity and need to be self-directing and to learn through problem-solving. Thus, they used the principles of adult learning, andragogy, before the pedagogical model was invented (Lindeman & Gessner, 1956).

Monastic schools introduced the pedagogical model with structured curriculum and didactic or teacher-directed instruction (Hiemstra & Sisco, 1990). The pedagogical model follows the assumptions that the teacher has full responsibility and makes all decisions as to what, how, when, and if learning will occur. After the fall of the Roman Empire, the academic system that spread to the secular world replaced andragogy with established curriculum which became the conventional education from childhood through adulthood.

The second half of the twentieth century brought an influx of nontraditional, adult students into higher education and a need to move from the pedagogical model of teacher-directed learning. Psychologists and educators looking at the biological, psychological, and social development of people believed the pedagogical assumptions were inconsistent with adult learners' characteristics. Adults are responsible for their lives and learning; consequently, they need a model of learning that addresses adult characteristics in the learning environment (Knowles et al., 2005). Andragogy is viewed by some as the "theory of adult education" (Merriam & Brockett, 1997, p. 135). Adult educators who follow the andragogical principles use instructional strategies designed to meet the learners' needs by keeping the student at the center of the learning experience.

A way to address the adult learning characteristics, using the principles of andragogy, is to establish a social enterprise program. In developing such a program, using the andragogical process, one must establish an environment conducive to learning, prepare the learners, engage in participative planning, diagnose the learning needs of the students, and create learning objectives. Developing a social enterprise also requires designing a learning plan, assessing and executing the plan, appraising objectives, and evaluating the learners' needs (Holton, Wilson, & Bates, 2009).

A social enterprise involves a "business activity and a social purpose" (Lynch & Walls, 2009, p. 9). A social enterprise is a social, mission driven, entity which applies market-based strategies to achieve a social purpose. Its primary purpose is the common good; the individual's basic right in society, the right of everyone to have the opportunity to freely shape his/her own life by responsible actions. A social enterprise applies an entrepreneurial approach to address social issues and bring about positive change in a community; it uses business principles to create social change by launching and managing a venture (Durieux & Stebbins, 2010).

Andragogy through social enterprise can be accomplished by establishing an actual working enterprise that meets a social need. Starting a real-world social enterprise as a learning environment to address adult characteristics will require expanding the vision of the organization, college or university. When it is not fiscally viable to start a real-world social enterprise, a second option could be used. Design a hypothetical social enterprise where market-based concepts are taught to the students. If the second option is the only feasible route, it may still be possible to help a disenfranchised group in a small way.

Starting a social enterprise requires innovation, accountability, and the ability to leverage resources you do not control (Bornstein & Davis, 2010). The requirements of innovation, accountability and leveraging resources are basically met by having a unique niche that is vital to a group of people, counting and measuring everything, and networking with businesses and the community for the resources you need in order to be successful. A social enterprise shifts emphasis from charitable relief to improving social conditions. Help should not be paternalistic but focus on dignity with respectful transactions. The key is to build capacity and self-reliance. A social enterprise is built on the premise of an ancient proverb, "give a man a fish and you will feed him for a day; teach a man to fish and you will feed him for a lifetime" ("Maimonides," n.d., expression 326751). The words of Dr. Martin Luther King were similar in his statement, "true compassion is more than flinging a coin to a beggar; it comes to see that an edifice which produces beggars needs restructuring" (Durieux & Stebbins, 2010, p. 36). A social enterprise is not compassion; it is allowing people to live up to their potential.

Exercises using social innovation and individualized business models involve creative vision and practical market-based strategies. The educator's role, whether establishing a workable social enterprise or helping students design a hypothetical social enterprise, is to foster self-directed learning, enhance problem-solving and critical thinking skills (Galbraith, 2004). Educators should encourage student ideas, questions, initiative, and collaboration (Bornstein & Davis, 2010).

Idea processing before starting a new social enterprise would include answers to the following questions:

- What is the product or service the enterprise will provide?
- What benefits will it offer and what needs will it meet?
- Is the product or service already being provided? If so, who is the competitor?
- How will it be produced and delivered?
- What is the intended market and customer? Describe the buyer.
- What is your competitive advantage?
- What is involved in conducting the business after it is up and running?

Social enterprises and business enterprises are similar but their primary objectives are different. Although a social enterprise is a revenue-generating business, its social objectives are reinvestment of surpluses in the business or in the community, not to deliver profit to shareholders and owners. "In a social enterprise the bottom line is to maximize social impact for a need that is not being met by typical business" (Bornstein & Davis, 2010, p. 30).

Accountability is important. To have an effective social enterprise the pursuit of accountability is the mechanism to make sure the goal of the social cause is met (Dees, Emerson, & Economy, 2001). It is an opportunity to show the added value to the community. An education social enterprise would evaluate using a quadruple bottom line; measuring the social, financial, environmental, and educational impact of the enterprise.

Developing a social enterprise entails identifying and applying practical solutions to social problems by combining opportunity with innovation and resourcefulness. It also entails finding a new product, service or approach to a social problem. In addition, it entails concentrating on the social value creation, leveraging resources, measuring and monitoring the impact, and a willingness to share insights and innovation for replication (Elkington & Hartigan, 2008).

The acronym DESIGN can be used to create the framework for a social enterprise learning laboratory with the following steps: describe, establish, structure, identify, guide and narrow. The Small Business Administration is a good resource for information and templates for start-up of an enterprise (*SBA*, 2015). It suggests the following steps:

- Describe the business and how it is a social enterprise. Explain the core business offering. What is the mission? Write a mission statement describing (a) Key market: Who is target market? (b) Contribution: What is the service or product that will be provided? (c) Distinction: How is product or service unique? If the mission is a cause for the common good, you would have to dismantle the whole business to get rid of the mission statement.
- Establish the need and available target markets. Balance impact and profit. Have a big vision and small plans.
- Structure a competitive analysis. Make a SWOT analysis listing strengths, weaknesses, opportunities, and threats. Create SMART and SMARTER goals for the social enterprise. Goals should be specific; who, what, where, when, which, and why? Goals should be measurable; establish criteria for measuring how much, how many and when things are accomplished. Goals should be attainable; develop the abilities, skills and financial capacity to reach them. Goals should be realistic; they must be consistent with other goals and fit into the immediate and long-range plans. Goals should be time based; there must be a target date for meeting goals. The Smarter goals also must be ethical and reasonable. Always plan and adjust.
- Identify parts of a marketing plan and create one for the social enterprise. Make a marketing plan using the 4 P's: Price, Product, Place, and Promotion. Conduct a market analysis and discuss how to market the social enterprise.
- Guide the process with a 3-year strategic plan, including goals, means for reaching goals, capitalization and implementation. Strategy is setting long-term goals and implementing the method for achieving the goals. Strategy describes what it is, what it does, and why it does it. Strategic planning is continual.
- Narrow the start-up focus to the financial base that will fund the plan. Create financial health; focus on efficiency and results. Measure the social impact against core purposes.

A social enterprise can be designed as a for-profit or not-for-profit. Social enterprise is known as the missing middle sector between government, nonprofit, and business. It addresses social concerns more efficiently than government, more sustainably and creatively than the nonprofit sector and more generously than business (Geelan, 2013). A business operated for the sole purpose to fund a nonprofit or a business that gives a portion of its profits for charitable causes is not a social enterprise. A social enterprise has at its core the common good; its reason for existence is to achieve a social purpose.

Measuring the impact of a social enterprise is different because outcomes are not merely measured for the fiscal return on investment (ROI) of business. Social return on investment (SROI) uses a principles-based method for measuring extra value, such as environmental, educational, and social values, that are not reflected in conventional financial accounting relative to resources invested. It can be used to evaluate the impact on stakeholders, to identify ways to improve performance, and to enhance investments. The SROI method provides a consistent quantitative approach to managing the impacts of a social enterprise project. It accounts for social impact identified by the stakeholders, with financial proxy values assigned to the impacts, which do not typically have market values. The methods can also use qualitative and narrative types of information for assigning value. "SROI is somewhat like a cost-benefit analysis designed to allow the decision-makers to evaluate and improve the social, educational, and environmental impacts of the enterprise" (Miller & Hall, 2012, p. 4).

The social impact is measured against the core purpose of the enterprise. Measures may include how many clients, students, or participants have made a life-change. The life-change could range from having food, clothing, shelter, clean water, transportation, medication, child-rearing skills, staying clean of drugs, alcohol, violence and other areas of life improvement. Financial reporting requires making a budget and reporting the money coming into the social enterprise and money going out. This is similar to every enterprise but its impact is clarified by the reporting of the other areas of influence for the social enterprise. Environmental reporting means measuring sustainability; the efforts undertaken to improve the environment that are embedded into the social enterprise. This may include areas such as recycling, using clean energy, and other environmentally-friendly endeavors. Measuring and reporting the bottom line of education could include grades, completions, job placement, further education, licensures, projects, and acquiring a marketable skill. Deciding the areas of measurement and reporting for the return-on-investment is germane to social innovation and the design of a social enterprise.

A social enterprise can produce measurable public benefits such as fiscal responsibility, economic opportunity, public safety, and a reduction in costs of public support. A social enterprise could provide job skills and employment by providing a path to economic self-sufficiency. Teaching job skills may improve the human capital and create jobs for economic renewal. A social enterprise could disrupt the cycle of poverty, drug abuse, crime, incarceration, and homelessness; therefore making the community a safer place to live. According to Geelan (2013), a social enterprise "operates more efficiently than public funds; there is still accountability but without bureaucracy" (para. 979). The Stanford Social Innovation Review defines social innovation as, "a novel solution to a social problem that is more effective, efficient, sustainable, or just than existing solutions and for which the value created accrues primarily to society as a whole rather than private individuals" (Phills, Deiglmeier, & Miller, 2008, p. 2).

Higher education has not widely embraced the value of education through social enterprise. However, there are some colleges and universities who are starting social enterprises or teaching the concepts to their students. Although it may not be overtly stated, these entities are using many of the principles of andragogy when teaching social enterprise. Harvard Business School (HBS) has an active social enterprise component. An associate professor of HBS stated, “one way to think about social enterprise is that social entrepreneurs often have to implement changes that break with the norms in their environment” (Battilana, 2015). Establishing a social enterprise using the principles of andragogy would undoubtedly break with the norms in many education environments.

One successful educational social enterprise is an accredited school established to train graduates of drug and alcohol recovery programs in the culinary arts. Students, under chef’s supervision, operate a restaurant and catering business as a practical learning laboratory. The students learn all aspects of the business through hands-on learning, have seated class time, and testing to earn national certifications. At the end of one year the graduate has several opportunities; articulate into a college culinary program, apply for a six-month externship at an upscale resort with a potential employment opportunity, or start a culinary career at a restaurant, hospital, or assisted living facility. The school in this example consistently has completion and placement rates above 91% for the at-risk population (http://www.victorytradeschool.edu).

Creating a social enterprise may seem to be a daunting task, but it need not be a cost burden. Due to the social enterprise framework of helping others, there are often community resources that can be leveraged. Knowing how to leverage resources is central to addressing social needs as well as financial needs. Starting with a hypothetical enterprise can solidify the questions and answers for the planning stage. When utilizing the principles of andragogy in helping adults learn, it is a natural progression to establishing a social enterprise learning laboratory.

An educational social enterprise requires the instructor to have expertise and a passion for the enterprise. The educator must have empathy with and trust of the students (Knowles, 1990). In planning and delivery of education in a social enterprise the instructor should use a “learner-centered process and accommodate learner uniqueness” (Henschke, 1989, p. 84). The instructor should also use the principles of andragogy in the learning process and recognize the unique characteristics of adult students. The principles of andragogy demonstrate that adult learners need to know how, what and why they are learning. Those students are self-directed and use their prior experience to connect in learning new information; they are ready to learn when they believe the knowledge will help them achieve future goals. Furthermore, the practical application of the social enterprise facilitates the adults need for problem-centered application in real-world situations and fosters the intrinsic motivation of the adult student.

When establishing a social enterprise the main goal is to determine the social aspect of the enterprise; the common good. It is also suggested that business principles should be used while keeping the core of the enterprise social. Establish measurements for the social return on investment using a quadruple bottom line. Incorporate the principles of andragogy into the social enterprise for maximum impact on adult learning.

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LEADERSHIP OUTSIDE THE BOX: THE POWER OF NURTURING THE HUMAN SPIRIT AT WORK IN AN ERA OF GLOBALIZATION

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ABSTRACT: The human spirit is an untapped resource that can fuel organizations in this era of globalization. While workplace spirituality is often seen an abstract philosophical construct that may be defined differently by each individual who studies it, fulfillment at work, shared values and sense of meaning along with a sense of belonging or connectedness are largely agreed-upon aspects. When attention is given to these arenas of human behavior, higher levels of engagement that lead to stronger performance and increased satisfaction can be achieved. A new mindset for leadership and education at all levels, local and global, and in all kinds of organizations is proposed to bring the human spirit into the light as a key resource for excellence, esprit de corps, and high performance. Tapping the power of the human spirit has become an educational and international requirement given the challenge of globalization.

Keywords: workplace spirituality, engagement, culture, values-based leadership, globalization

Workplace spirituality is often seen as an abstract philosophical construct that may be defined differently by each individual who studies it (Case & Gosling, 2010; Kinjerski & Skrypnek, 2011). However, the overarching agreed-upon definition includes fulfillment at work, shared values and sense of meaning, and a sense of community or connectedness at the individual, group, and organizational levels (Case & Gosling, 2010; Milliman, Czaplewski, & Ferguson, 2003). It also involves shared values between the individual and organization, a belief that one's work contributes to a higher purpose in a meaningful way (Friedman & Friedman, 2014; Kinjerski & Skrypnek, 2011). Spirituality at work does not necessarily connote religious involvement but rather personal philosophy and individual values, although religion may be an important part of this for some people (Friedman & Friedman, 2014; Milliman et al., 2003). When implemented appropriately, workplace spirituality recognizes everyone as individuals with inner lives in which their career or job is only a part of the larger organism and supports the universal human search for a higher purpose or meaning in their existence and work (Duchon & Plowman, 2005; Milliman et al., 2003). This recognition and subsequent encouragement of individuals to express their inner selves in their work leads to positive employee work

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attitudes and habits, reduced employment churn and absenteeism, and increased organizational commitment (Milliman et al., 2003; Rego & Pina e Cunha, 2007). Applying this concept in this era of globalization may benefit all stakeholders, including employees, owners, suppliers, customers and consumers as well as educators and students of Western and Eastern societies. Enhancing the inner lives of employees by helping them find personal fulfillment in their jobs oftentimes increases employee productivity and organizational success while raising awareness of corporate social responsibility (Chalofsky, 2010).

The Rise of Workplace Secularism in the Global Economy

Modern society's emphasis on secularism in the workplace was popularized by Western European and American rises to power in the global economy (Milliman et al., 2003).The concept of rationalism being founded in secularism and necessitating the dissociation from religion was Western in nature and quickly spread through the culture of global capitalism as established by these two Western powers (Milliman et al., 2003). While capitalismn power and prevalence can be easily seen today in workplaces, including businesses, shopping malls, and government organizations all over the globe, there is a growing interest human values and the spirit of the individual. For example, 80% of first-year college students expressing interest in spirituality (Friedman & Friedman, 2014).

Modern connotations of the term "spirituality" in Western cultures tend to be heavily religious in nature (Case & Gosling, 2010). The integration of religion into the public spaces of work and economy is typically frowned upon in modern Western society, where the separation of church and state has extended by implication to a separation of church and public spaces (Milliman et al., 2003). In many areas, religion is now considered to be part of the individual and group private domain. Violating the taboo by bringing it into a public space is met with attitudes ranging from discomfort to anger, and actions from protests to lawsuits (Bubna-Litic, 2012; Case & Gosling, 2010; Tourish & Tourish, 2010). Bubna-Litic (2012) took a novel approach in the implementation and ideation of spirituality in the workplace, defining it as less of a value-add and more of a necessary social responsibility of corporations to provide for their employees.

Indeed, spirituality—and religion that is sometimes associated with it—is a deeply personal belief system that helps shape individuals and is a large part of their personality and expression thereof (Friedman & Friedman, 2014). Its extreme importance to an individual's sense of identity and life-meaning is precisely why its integration should be encouraged in the workplace. Workers are expected to separate the work-self from the personal-self between the punches of the timecard. This practice can lead to a reduction in the feeling of an employee's alignment with organizational values as vocalizing their own values is often prohibited by company policy, especially those parts of spirituality related to religious or political creeds (Milliman et al., 2003). This rigid compartmentalization of identity imposed on workers by the employing organization also leads to employees feeling that their work is devoid of personal or higher meaning

(Chalofsky, 2010). Instead they are simply accomplishing rote tasks or following orders or operating within limited degrees of freedom and self-expression.

As Milliman, Czaplewski, and Ferguson (2003) found, through quantitative analysis, greater perceived experience of personal purpose and meaning in one's job as well as a greater sense of community at work are both associated with a greater intrinsic work satisfaction, greater job involvement on the part of the employee, and a greater sense of organizational-based self-esteem. A sense of alignment with organizational values and community also lessens the likelihood that the individual will quit. All three aspects--community, sense of alignment, and personal purpose and meaning--were positively correlated with increased commitment of the individual to the organization. Therefore, the more spirituality and spiritual expression that leaders allow individual employees to breathe into their work, the greater employee morale and engagement, coupled with a decrease of employee churn (Milliman et al., 2003). This concept of employee engagement through caring for the individual worker by nurturing the human spirit is largely only new in implementation and not in ideation as it has roots in the works of Max Weber, Karl Marx, Emile Durkheim, Michel Foucault, and many other social scientists, although in many cases their intentions for this expansion were solely utilitarian (Case & Gosling, 2010). It is important to recognize the possibility of organizations using workplace spirituality solely as a commodified means of increasing production to the detriment of the worker (Case & Gosling, 2010; Milliman et al., 2003). With an understanding of globalization as the process of international integration arising from the interchange of world views, products, ideas, and other aspects of culture with the objective of shared benefit, partnering spirituality in the workforce with an increasingly global reach makes sense for the individual, the collective, higher education and the corporate structure.

Global Applications of Nurturing: Eastern Versus Western Environments

In recent years, workplace spirituality has been defined and implemented in many different ways and types of workplaces (Case & Gosling, 2010; Friedman & Friedman, 2014; Milliman et al., 2003; Petchsawang & Duchon, 2009). However, this article focuses attention on nurturing the human spirit at work, an aspect of workplace spirituality, as an integral growth-oriented force in this era of globalization. The deepening Information Age has brought with it global connectivity and with that connectivity has come instant news cycles, greater attention to issues outside one's native country, and a sense that we are "all in this together," as voiced by numerous political, social, and spiritual leaders. There is a growing realization that what happens in one part of the world impacts other parts of the world, sparking not just a self-interest in work events but a growing interest in others. Encouraging leadership that focuses on the spiritual nature of all people is deemed a worthy cause, though not without its challenges on many fronts. This approach to leadership requires an almost anthropological understanding that different cultures may define workplace spirituality in many different ways due to their own particular histories and cultural relativism. It also necessitates strong interpersonal skills, emotional intelligence, courage, effective relationships between management and employees, and a global perspective (Chuang, 2013; Fairholm, 2015). These traits are not new to leadership, but magnify in importance and oftentimes take different forms when considering employee relations in light of generating understanding in multicultural environments, both within an organization and between organizations within the global economy (Fairholm, 2015). This cultural understanding may be defined as cultural relativism, an axiomatic anthropological principle established by anthropologist Franz Boas: a person’s belief systems, values, and behaviors must be viewed within the context of that individual’s own culture in order to be truly understood by others (Stocking, 1966). Petchsawang and Duchon (2009) recognized cross-cultural applications as a limitation in their study of workplace spirituality in a Thai Buddhist-centric organizational environment. In their study, the company examined was well known for the strong Buddhist traditions fostered by the company. The authors acknowledged that the prevalence of these traditions within the company and the predominant culture of the locale may have consciously or subconsciously made the employees more aware of the spiritual aspects of work (Petchsawang & Duchon, 2009). Therefore, this situation may have made the individuals more likely to respond positively to workplace spirituality and the survey provided by the authors.

This scenario is quite different from Western work cultures such as the American workplace environment, which tends to be highly secular. In fact, spirituality in the workplace is not typically encouraged and in many cases discouraged, and so individuals and organizations may have quite different understandings of and reactions to the concept of workplace spirituality (Petchsawang & Duchon, 2009). The same is true in the arenas of higher education, especially in business and medical schools.

As culture is a superorganic concept that is constantly changing through societal development and reinforcement of values, organizations would need to consistently integrate new cross-cultural information to maintain a relevant and competitive company culture within the workplace and the global market (Chuang, 2013). Values may be thought of as a tether between the individual self and the collective society that informs decision-making processes and partially determines behaviors performed by the individuals and societies that share in them (Cheng & Fleischmann, 2010). Societal values are both products and reinforcing components of culture. According to renowned sociologist Emile Durkheim (1960), the importance of value-effect on guiding behaviors and decisions extends beyond the individual realm and goes so far as to guide the collective consciousness of societies. Since organizations are built by groups of individuals who hold values, the shared values hold significant influence over corporate policy and strategy (Cheng & Fleischmann, 2010), thus making values such as workplace spirituality applicable to both individualistic and collectivistic societies in the context of globalization. Gupta, Bishnoi, and Mathews (2012) recognized this phenomenon in their study of workplace spirituality in Indian society. They discussed the concept of spirit at work as being a Western need, but caution that Eastern societies should also take this into account in the globalization of the economy due to the large Western cultural influence on modern world economics, industry, and politics (Gupta et al., 2012). These authors view workplace spirituality as not only a benefit but as necessity for successful operation within the global economy. However, they also understood that the model they put forward contained different criteria than those included in many Western workplace spirituality studies (Gupta et al., 2012; Milliman et al., 2003). This foundation opens the discussion of various forms and approaches to nurturing the human spirit in the context of globalization.

Discussion

Implementing workplace spirituality with a distinct focus on nurturing the human spirit in Western societies requires the openness of organizational leadership to try something new in a largely secular society often riddled with lawsuits of perceived offenses based on expression of various beliefs within the workplace. Friedman and Friedman (2014) discussed the success experienced by Southwest Airlines (SWA) in using workplace spirituality to enhance employee, customer, and shareholder satisfaction. By using profit-sharing instead of pensions, encouraging employees to offer personable and fun service, and making a positive contribution to the world by offering low fares to people who might not otherwise be able to afford them, SWA created an organizational community and culture (Friedman & Friedman, 2014; Milliman et al., 2003) based on love, the heart of spirituality in most of the world's religions and spiritual paths. Although SWA is known to pay the highest wages within its industry and have the lowest prices, this company also has exceptionally high employee productivity, with many employees choosing to continue working even after having been made millionaires by virtue of their profit-sharing (Friedman & Friedman, 2014). However, as appealing as such results may be, getting everyone on board with an arguably successful concept of nurturing the human spirit in a global economy can be a difficult task.

Although SWA has experienced much apparent success as a result of their spiritual values-based model, many other companies within their own industry have not yet emulated their ideas (Friedman & Friedman, 2014). Encouraging organizations that operate within the global economy to adopt workplace spirituality requires the bridging of understanding between individualistic and collectivistic cultures in the East and West to find points of shared organizational and personal understanding to facilitate more productive cooperation and partnerships. Sledge, Miles, and Van Sambeek (2011) discussed the importance of culture as an influence in international business in their study of workplace spirituality and multiculturalism of businesses in Canada, Mexico, and the Netherlands. Some researchers argue that globalization will result in a single unified world business culture, while others contend that national cultural diversity will persist within the realm of the global economy (Case & Gosling, 2010; Sledge et al., 2011). In their exploratory study, Canada and the Netherlands were highly individualistic and Mexico was collectivistic, but the authors found that the businesses studied within the three countries shared motivating factors that bridged cultural divides (Sledge et al., 2011). However, they also cautioned against attempting to fit a single model of workplace spirituality across different cultures as individuals in the study seemed to define it differently. This situation is something the authors recognized as possibly being influenced by loss of meaning due to translation and interpretation (Sledge et al., 2011).

Gupta et al. (2012) proposed the implementation of a cultural officer to assist in the transition to and maintenance of workplace spirituality within organizations integrating this concept into their work environment. This position would operate independently of Human Resources and be part friend, philosopher, motivator, arbiter, mentor, coach and guide to employees, while also working with public relations in representing the organization as a conscious one in regard to corporate social responsibility (Gupta et al., 2012). Additionally, this position could plausibly be quite beneficial as an operative within the workplace spirituality of the global economy. Ideally the cultural officer would be present in organizational meetings between companies from different ideological backgrounds or act as an informational resource prior to meetings to aid in the cultural relativist understanding of each group. This process would aid in promoting mutual understanding of collectivistic versus individualistic organizations and in the mediation of any disagreements resulting from cultural misunderstandings on the individual, group, and organizational levels. This position could also be charged with ensuring that workplace spirituality is executed appropriately to prevent exploitation of workers. In areas with unions, the cultural officer could also serve as a liaison with the union and/or the internal Human Resources Department to ensure that employees are treated justly and ethically.

This paper's first author twice held positions akin to the "cultural officer" Gupta et al. proposed. The first was as head of a program entitled Project Miracles, a turnaround initiative at AT&T Consumer Products in the late 1980s. So-named by the division president Kenneth Bertaccini, the values-driven initiative was designed to nurture employees as people (distinct from workers) and give them tools to live a more fulfilling life. In less than two years, business results improved dramatically, staving the sell-off of the division (Rutigliano, 1996). The second experience of the author was as Manager, Culture Transformation at a nuclear power plant in the United States with 1800 people from 1998-2003. Initiatives created focused on healing what the President and Chief Nuclear Officer articulated as "the broken spirit of the nuclear business unit." Step-change improvements in safety, productivity, morale, and job satisfaction resulted (Rutigliano, personal communication, June 12, 2003).

While a cultural officer can be a viable component of on-the-job workplace spirituality implementation, initiating understanding of what it means to nurture the human spirit at work could be equally beneficial by including this leadership approach in business school curriculum and leadership development programs of all types (Crossman, 2015; Dhiman & Marques, 2011; Friedman & Friedman, 2014). In addition, entire organizations, such as the Society for Human Resource Management, exist to oversee the impact of globalization on individuals and corporations. There is an industry of trainers who work to assist companies around the world understand the role of culture and spirituality as it relates to shared outcomes and mutual benefit (www.shrm.org). In *The Culture Map: Breaking Through the Invisible Boundaries of Global Business*, author Erin Meyer (2014) asserts that the process begins with recognizing the cultural factors that shape human behavior and methodically analyzing the reasons for that behavior. Globalization and spirituality, separately and combined, call for a deeper understanding of the individual within the workforce and the relationship of each workforce in the context of the world stage. Business curricula focusing on ways and means of nurturing the human spirit can be of tremendous value as a focus in the arenas of leadership, human resources, and organizational behavior, for example.

Colleges are already recognized as hotbeds of cultural change, but corporate business organizations in and of themselves have also become a primary form of social organization in which corporate trends drive even college program transformations (Case & Gosling, 2010). Nearly 60 percent of the top economic entities in the world during 2012 were corporations (Walls & Triandis, 2014). Many major companies, such as Apple and Google, have fostered their own set of cultural values and community (Case & Gosling, 2010). This economic power on a global scale surpasses economic manipulation and results in these organizations shaping consumer lives as well as those of the competing and partnering organizations in socioeconomics, politics, technology, and social psychology (Walls & Triandis, 2014). When this power is coupled with the creation of a corporate culture in companies, it also drives a competitive advantage to obtain the best and brightest individuals to fuel those companies (Case & Gosling, 2010). As best-selling author and California Congressional candidate Marianne Williamson stated, “We can radically uplevel our approach to leadership by focusing on holding the space for the brilliance of others rather than striving to succeed on our own” (Williamson, n.d.). Such a paradigm shift in leadership thinking can produce higher quality outcomes and revolutionize how the concept of success is considered.

In the days before the technological revolution, there was a primary facilitation of exploring personal and shared values and deepening an understanding of other cultures. The practice may appear simplistic now, yet the children who corresponded with pen pals from other countries received an early education in the role of differing cultures in the development of personal values and spirituality and fostered an openness to ways different from a single cultural norm. Perhaps there is a means, in the spirit of globalization, to revive this old practice in the context of our broadening global economy. The Internet has opened the gates of communication in ways previously unimagined. A broader understanding of the ways other cultures integrate spirituality into their workplaces may prove to be a way to reduce the resistance of some American companies to embracing the leadership approach of nurturing the human spirit at work as demonstrated by SWA.

Arianna Huffington addressed the importance of redefining the meaning of success in the modern global economy within her recent book *Thrive* (Huffington, 2014), which includes an excerpt from a commencement address she gave during the spring of 2013 at Smith College. During this speech, she described a work paradigm in which money, power, and well-being are all important components of a successful management scheme and organization. She defines well-being as a human ability involving compassion, giving, intuition, and a sense of wonder. Additionally, Huffington draws upon her own experiences in recommending mindfulness and meditation in the workplace as well as an individual’s personal life to increase quality of life and work. However, although money and power are certainly largely associated with successful businesses, they are counterintuitive to the human spirit and in many ways often drain it. Keeping

Huffington's model of well-being as the deprioritized third metric of success behind money and power is more impetus for employees to be merely invested in their work rather than enriched by it and vice versa. By fostering a sense of the human spirit in the workplace and making nurturing that spirit the top priority, money and success may naturally be increased as employees put more of their heart, soul, skills, talents, and strong work ethic into their tasks (Schultz & Jones Yang, 1999).

An excellent real-world example of this idea comes from Starbucks, a company with a well-established and impactful place in the global economy that also prides itself on corporate social responsibility and workplace spirituality (Behar, 2009; Schultz, 2011; Schultz & Jones Yang, 1999). This mentality is reflected in their mission statement, "To inspire and nurture the human spirit—one person, one cup, and one neighborhood at a time" (http://www.starbucks.com). When Schultz set out to develop Starbucks, he did so with a values-based model of leadership and corporate social responsibility in mind (Schultz & Jones Yang, 1999). As a young man who grew up in the projects of New York, Schultz recognized that organizational success was not possible without the contributions of even the lowest-paid employees and viewed the success, nourishment of inner lives, and care of employees as the responsibility of management (Schultz & Jones Yang, 1999). By encouraging workplace spirituality through viewing employees as people instead of profit components, building trust, and providing a higher fulfillment through corporate social responsibility, Schultz was able to break into the global economy with Starbucks (Behar, 2009). When he returned to Starbucks as CEO in 2008 following its rapid decline, he was able to turn it around again and cement its position as a leading company in the global market through re-implementation of a values-based organizational model, becoming yet another example of spirit at work in action (Schultz, 2011).

Future Research Implications

Future research should include case studies utilizing a cultural officer in multiple Eastern and Western organizations working in conjunction with unions and human resources departments. This would evaluate the best form this position would take, provide areas of potential use, expansion, and improvement, and identify areas of global applicability. More research should also be performed in global markets to determine transcultural values between Eastern and Western corporations, including differences concerning global application of workplace spirituality in individualistic and collectivistic societies. Applying lessons of former generations, new technology allows youngsters to learn cross culturally before entering higher education (https://penpalschools.com). Globalization requires new models of learning inserted earlier into the educational experience. In addition, initiating long-term studies of university students, business leaders and employees who have participated in spirit-at-work classes, workshops, and seminars would help determine the most efficient and lasting way to train new leaders in the way of workplace spirituality as a modern management tool and catalyst for workplace transformation. Lastly, cross-cultural studies of workplace spirituality using congruent as well as adapted cultural-equivalent surveys will be important for elucidating the constructs in workplace spirituality that may be universally understood in contrast with those that may require more work to be applicable in the global economy.

Conclusion

A holistic anthropological perspective may be the key to implementing workplace spirituality in this era of globalization. While Petchsawang and Duchon (2009) found that workplace spirituality is utilized on some scale in Eastern as well as Western societies, there are still many issues to overcome to have nurturing of the human spirit at work commonplace across the globe. Organizations and individuals must maintain a degree of cultural relativism to bridge the gaps between Eastern and Western concepts of workplace spirituality and its components. Additionally, finding common values between individualistic and collectivistic societies will be key to cementing alignment of organizational values on the organization-to-organization level as well as that of individual-to-individual. Finding common values must be done by holistically examining the different cultures involved in the global economy and identifying homogeneous factors to build from before an attempt to create a synergistic relationship between different organizations' workplace spirituality is initiated (Dhiman & Marques, 2011; Fairholm, 2015; Vallabh & Singhal, 2014). Once this is accomplished, the use of a cultural officer derived and expanded from Gupta et al. (2012) would be an excellent solution for bridging cultural gaps in multicultural organizations and partnerships as well as addressing potential employee exploitation. Additionally, adding classes on workplace spirituality and leadership approaches to nurturing the human spirit to undergraduate and graduate business program curricula, workshops, and on-the-job training stand to benefit individuals, employing organizations, and society (Case & Gosling, 2010; Crossman, 2015; Dhiman & Marques, 2011; Friedman & Friedman, 2014). The other side of the world is no longer a ship journey or even a plane ride away; it is accessible with only a key stroke. To assure America's long-term competitive edge in an increasingly global economy, the synthesis of personal values and spirituality and the knowledge of bridging our own culture to others must begin in the earliest opportunities in our country's classrooms. In the context of the global economy and in measurement of company performance, nurturing the human spirit at work is a multifaceted investment that, when implemented thoughtfully and well and for the correct reasons, could benefit all.

Definition of Terms

Workplace spirituality. A cultural and leadership concept that recognizes that people have inner lives, including values and beliefs that should be encouraged in the workplace to enable fulfillment of personal meaning in work and to enhance the work experience.
Spirit at work. Synonym for workplace spirituality.
Globalization. The process of international integration arising from the interchange of world views, products, ideas, and other aspects of culture with the objective of shared benefit, including the corporate and individual benefits derived from promoting spirituality in the workforce with an increasingly global reach.

Corporate social responsibility. The commitment by employing organizations to enhance the quality of life of employees, as well as the community and society in general, while also contributing to economic development.
Workplace secularism. The policy of keeping spirituality in the private lives of employees and out of the public life that is the workplace.
Values. Principles of behavior or judgment related to what is considered important in life and which inform behavior and decisions.
Super-organic. A criterion relating to the structure of culture in society that is independent of members within the society.
Human spirit. The mental, emotional, spiritual, and philosophical components of humanity.
Values-based. A leadership model in which a set of values guides organizational and employee behaviors and mission statements.
Cultural relativism. An anthropological principle stating that the values, beliefs, and practices of a culture must be viewed from the perspective of that culture to be understood by outsiders.

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LIFELONG LEARNING AND VOCATIONAL EDUCATION: INSTITUTIONAL REQUIREMENTS AND UNIVERSITY DIDACTICAL CONCEPT OF A MASTER DEGREE PROGRAM "TEACHING QUALIFICATION FOR VOCATIONAL EDUCATION IN THE FIELD OF HEALTH CARE AND NURSING" AT THE OTTO-VON-GUERICKE-UNIVERSITY (GERMANY)

Astrid Seltrecht, Jun.-Prof. Dr. phil.[1]

ABSTRACT: Professional biographies of US-American nursing staff emphasize that these staff have consciously decided to conduct research for a Ph.D. in Adult Education instead of Nursing Sciences. The evaluation of the interview transcripts revealed two main categories: "Doctoral degree as an expression of a 'lived' lifelong learning" and "Doctoral degree as a scientific adaptation of skills" (Seltrecht 2014). However, these insights into the data material also revealed significant research desiderata: Can country-specific differences be made out concerning the understanding of what lifelong learning is thought to be? How can the relationship between lifelong learning and occupational education be described and what share do the specific requirements of nursing have in this context? A more in-depth comparison of countries is necessary for the professionalization of both nursing and education sciences in Germany. Such a comparison may reveal *institutional conditions* that accommodate a way of understanding "lived" lifelong learning that would be beneficial to the individual professionalization of each professional nurse - and could promote the collective professionalization of nursing beyond the individual case. The *institutional conditions* will be the focus of this year's paper. The example of a master's degree program "Teaching Qualification for Vocational Education in the Field of Health Care and Nursing "at the Otto-von-Guericke University Magdeburg (Germany) is used as a starting point for discussion. This degree program prepares nurses, therapists and other nursing staff for teaching positions. These future teaching staff will deliver training and vocational education programs in a variety of health care and nursing occupations such as physiotherapists, elderly care nurses, medical care assistants, dental care assistants, and many others. The crucial point is: students of this program have never practiced these occupations.

Keywords: Didactical Concept, Vocational Education, Health Care, Nursing, Double Case References

The paper will first elaborate the decision-making process that culminated in the implementation of this particular degree program. Subsequently, the degree structures are outlined concisely. Finally, the underpinning of the university didactical concept for the occupational field of "Health Care and Nursing "is introduced. In doing so, the underlying theories and concepts are discussed. These concepts and theories illustrate the interlinking of academic discipline and teaching methodology in order to foster a "theory-practice-transfer."

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The paper offers participants the opportunity to gain insights into the conceptualization of a German degree program. Furthermore, an international debate on questions of andragogy is fostered. Finally, yet importantly, the presentation sets the foundation for a comparative analysis of lifelong learning and vocational education in the United States and Germany.

Establishing the Vocational Discipline of Health and Nursing

The vocational discipline of health and nursing in the master's degree program for teaching at vocational schools is based at the Institute for Vocational Education and Human Resources Development. This institute has a history of 50 years in educating vocational school teachers.

Following an agreement between two ministries of the Land Saxony-Anhalt and the Otto-von-Guericke University Magdeburg, the vocational discipline of "Health and Nursing" was implemented into the teaching degree program, starting in the winter semester 2012/2013.

Structure of the Master's Degree Program for Teaching at Vocational Schools in the Vocational Discipline of Health and Nursing

The Consecutive Bachelor-Master Model

The bachelor's program "vocational training" (B. Sc.) comprises discipline-related scientific education in one optional profile/subject (e.g. engineering education/metals technology) with 100 credit points (CP), study of educational sciences with 30 CPs, study of one teaching subject (40 CPs) and doing a bachelor's thesis (10 CPs).

For discipline-related scientific education students can choose among three optional profiles:

Profile of engineering education comprising the subjects

- construction engineering
- electrical engineering
- information technology
- metals technology
- process technology

- Profile of business and economics education comprising the subject
    - economy and administration
- Profile of economic and technical education comprising the subjects
    - technology
    - economy

The subjects of health and nursing are not included in the bachelor's program "vocational training" (B. Sc.). Consequently, the bachelor's program "vocational training" (B. Sc.) does not include any discipline-related scientific offering regarding health and nursing sciences, so that it is not possible to do a bachelor's program "vocational training" (B. Sc.) with the subjects health and nursing at the Otto-von-Guericke University.

Hence, students intending to complete a master's degree program with the degree “Master of Education” for teaching at vocational schools in the vocational discipline of health and nursing need to come from other universities. At the Otto-von-Guericke University Magdeburg they have the option of a lateral entry into the Bachelor-Master model provided they meet the admission requirements. Thus, the study program for teaching at vocational schools in the vocational discipline of health and nursing is different from the Magdeburg Bachelor-Master model: For the vocational discipline of health and nursing only a master's degree program is offered - that is, all students of this vocational discipline need to have earned the relevant bachelor's degree at another university.

The Bridge Program for Lateral Entrants

Students intending to do the master's degree program for teaching at vocational schools in the vocational discipline of health and nursing have to meet the following preconditions:

- bachelor's degree earned in an accredited study program
- 100 CPs in health and nursing sciences
- 40 CPs in a subject offered at the OVGU
- 30 CPs in vocational and in-company education

Every application is examined individually with respect to these admission requirements. In any case applicants have to provide 100 CPs in the field of health and nursing sciences, which can be produced by having completed a corresponding study of health and/or nursing sciences. Should an applicant not be able to present the required credit points for vocational education and human resources development and the teaching subject (German, ethics, social studies, sports, computer science, protestant religious education, mathematics; state: May 2015) they have the option to earn these CPs in the context of a bridge program at the Otto-von-Guericke University Magdeburg. So this bridge program allows for catching up on the performances from the bachelor's program "vocational training" (B. Sc.) (cf. fig. 1). As a result of this lateral entry there is certain heterogeneity within the group of students with respect to the discipline-related scientific part of the study program in the field of health and nursing sciences. This heterogeneity does not occur to such an extent in the other study programs that merge "regularly" from the university's own bachelor's program "vocational training" (B. Sc.) into the master's degree program. In addition, the heterogeneity among the students of the vocational discipline of health and nursing is a result of the different discipline-related shares deriving from the different vocational qualifications that are considered.

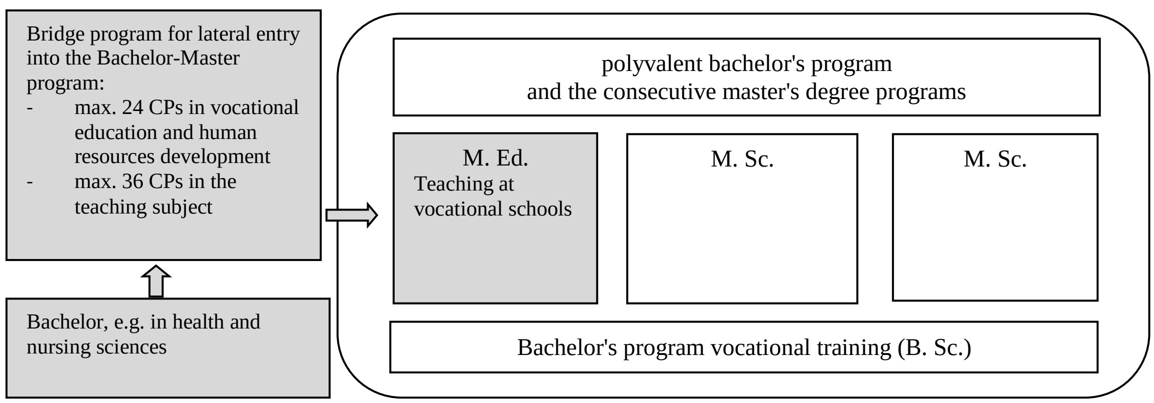

Figure 1. Lateral entry into the Bachelor-Master model

Out of 38 students enrolled in the summer semester 2015, 23 have a nursing profession, 10 have a therapeutic profession, three (3) a medical assistant profession and only two (2) of those enrolled have not completed any prior vocational training.

An aspect not very relevant for the admission procedure but for the study motivation and organization of the students is the experience with the structures of university study programs (cf. Seltrecht, 2012): As opposed to general universities, at universities of applied sciences (formerly called Fachhochschulen) it is rather usual to have study schedules prescribing precisely when which courses have to be attended. From the 38 students of all semesters enrolled in the vocational discipline of health and nursing, 13 have earned their bachelor's degree at a university and 25 at a university of applied sciences.

For the attitude towards the study program--that is, whether it is experienced as a chance for their vocational biography or rather as a downgrading with respect to the subject--the existence of own teaching experiences is relevant (cf. Seltrecht 2015b): More than one third of the 38 students have already had own teaching experiences.

Consequently, thinking in terms of university didactics, the heterogeneity regarding vocational, scientific and teaching experiences and the students' resulting subjective attitude towards the study program are to be considered.

The Master's Degree Program for Teaching at Vocational Schools in the Vocational Discipline of Health and Nursing

The master's degree program for teaching at vocational schools in the vocational discipline of health and nursing comprises three main areas: the vocational discipline of health and nursing (30 CPs), the teaching subject (40 CPs) and vocational education and human resources development (30 CPs). The study program is completed by doing a master’s thesis (20 CPs). In particular when considering the conditions imposed in the context of the admission procedure for lateral entrants, i.e., students coming from not teaching-related bachelor's programs into the first stage of the teacher training, the vocational discipline health and nursing represents the lowest share of the entire master's degree program:

Vocational discipline health and nursing: 30 CPs

- Vocational education: 30 CPs and up to 24 CPs conditions imposed (= 54 CPs)
- Teaching subject: 40 CPs and up to 36 CPs conditions imposed (= 76 CPs)
- Master thesis: 20 CPs

Within the vocational discipline of health and nursing (30 CPs) three modules have to be completed:

- Academic discipline: Evidence-based practice (EBP) in health and nursing professions (10 CPs = two courses)
- Teaching methodology for the vocational discipline of health and nursing (10 CPs = two courses)
- Profession-related practical studies (10 CPs = internship at a vocational school in Saxony-Anhalt and an accompanying seminar)

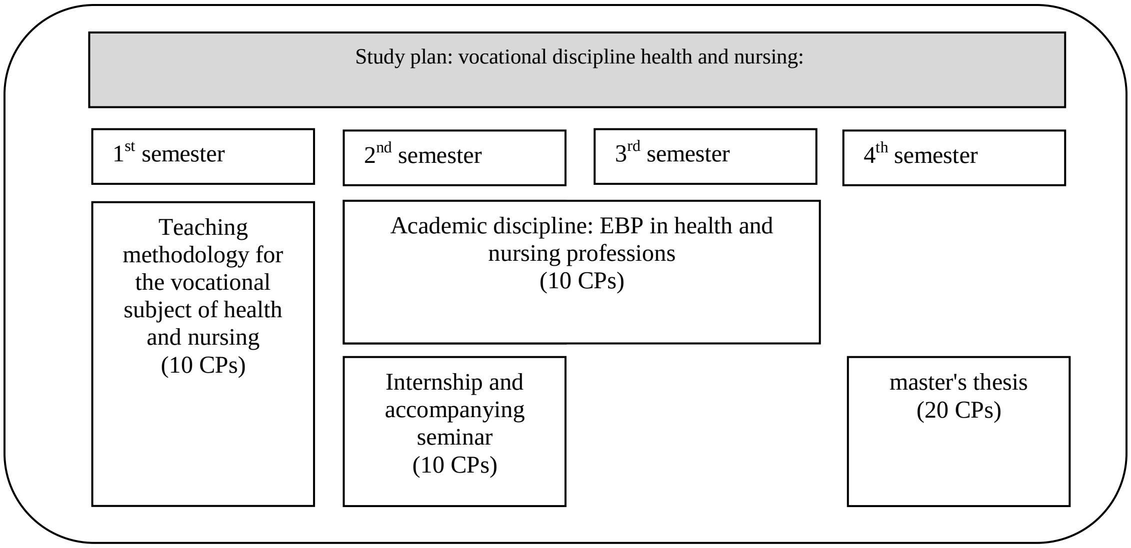

Figure 2. Study plan of the vocational discipline health and nursing for the four-semester master's degree program (the figure shows the study plan at the beginning of studies in the winter semester)

The objective of the three modules is that students acquire comprehensive discipline-related and multidisciplinary competences. In the module manual the following objectives are outlined: "With respect to discipline-related competences the graduates will be enabled to use discipline-related knowledge to describe, analyze and structure training and examination structures, work and business processes as well as offers for continuing education in the vocational field of health and nursing;

– explain fields of teaching activities and assess them in their relevance for vocational training offers;

– plan, perform and review teaching at vocational schools in the field of health and nursing, involving their knowledge of teaching methodology and using adequate methods;

– to prepare and communicate issues of health and nursing sciences in a customized way, considering the background of diversity and inclusion (e.g., supportive assessment, support concept);

– describe the integrated quality management (GQM) at vocational schools, comprehend and interpret specialist texts on health and nursing sciences composed in both German and English language;

– reflect and assess issues in the field of health and nursing sciences within the conflicting areas of work, health and society (e.g., age/ageing, diversity);

– deal with findings in the field of health and nursing sciences considering the underlying methodology and the evaluation of sustainability and range of the results, in both disciplinary and interdisciplinary research.

With respect to multidisciplinary competences graduates will be enabled to

– specify potential professional support (e.g., teacher's conference, case conference, supervision);

– describe and evaluate student-student interactions and student-teacher interactions,

– reflect their motivation for this study program and profession as well as the decision for this career on the basis of own practical school experiences;

– reflect their own health support activities (e.g., stress management) against the background of what is required from teachers at vocational schools, and integrate them into their own everyday professional life using action schemes;

– describe the role of teachers with respect to their social significance." (OVGU, 2015, p. 7)

Teaching Concept for the Vocational Discipline of Health and Nursing

Five courses are offered in the vocational discipline of health and nursing; and students have to complete a school internship (cf. Figure 3)

Taking into account the students' previous experiences and the requirements for teacher training, the curriculum offers various options within the discipline and within teaching methodology, thus allowing students to acquire a broad range of competences by completing the available courses.

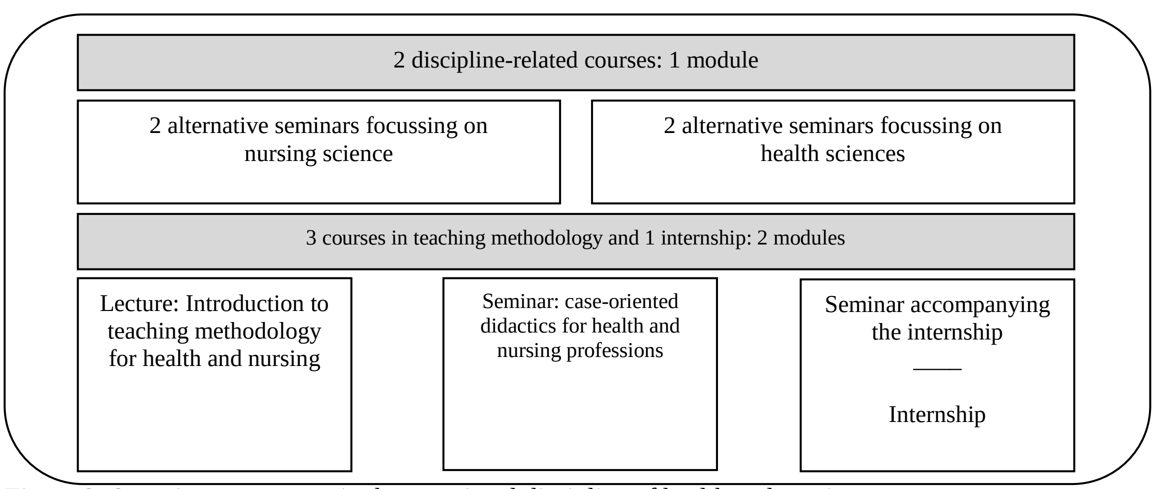

Figure 3. Overview on courses in the vocational discipline of health and nursing

"In the context of the specialized master's program students can compose an individual profile by choosing courses from the alternative specialized offer, thus adding health or nursing competences to their own competence profile. In the context of the training in teaching methodology students are given the opportunity to develop individual competence profiles in either health or nursing in the frame of their profession-related practical studies; these are accompanied by a concept of inner differentiation through teaching technology courses and potential profiling within the profession-related practical studies" (Seltrecht 2014, p. 4).

In this way students coming from health sciences are given the opportunity to learn about and deal with current topics of nursing sciences. Students coming from the field of nursing sciences, on the other hand, are provided with the opportunity to learn about and deal with topics from the field of health sciences. In the context of teaching methodology training, namely the seminar on case-oriented didactics, students are asked to do a project thesis or a term paper on a profession they do not come from. Gaining insight in professions not known from one's own practical experience is possible in the context of the school internship and it is recommended.

In addition to the opportunity of profiling themselves by way of choosing courses in the academic discipline and by an inner differentiation within teaching methodology, also the commonalities of the profiles health, nursing and--as in Saxony-Anhalt graduates are also deployed in this field--personal hygiene play a significant role.

There are commonalities regarding the academic reference sciences, e.g., medicine and social sciences, especially medical sociology. Furthermore, all three fields have in common that they render services to persons, e.g., therapeutic treatments to patients, nursing services to the inhabitants of nursing homes or services provided to customers. So in all three person-related domains there is a case reference where subjective needs of the addressees always have to be considered as well (Seltrecht, 2015a; 2015d). Professional acting under the condition of an existing case reference that is to be considered, is examined in studies in the field of health and nursing sciences, educational sciences and teaching methodology. Consequently, from the perspective of both health and nursing sciences and educational sciences, it is relevant for the training of teachers in the vocational discipline of health and nursing.

Apart from these different research areas, case references are also relevant in the areas of action in health and nursing and in educational areas of action including the teachers at vocational schools. Teachers in the field of health and nursing have to be able to deal with case references within health and nursing-related activities and with cases references within educational activities. Therefore the teaching methodology training is oriented towards communicating the "double case reference" (Seltrecht, 2015a).

The concept of university didactics can be summarized as follows: The university didactics concept of the vocational discipline of health and nursing in the master's degree program for teaching at vocational schools at the Magdeburg Otto-von-Guericke University is centered around the curricular design of alternative optional courses in the academic discipline and by inner differentiation within teaching methodology courses while interlinking academic discipline and teaching methodology, or theory and practice, under the perspective of "double case references" (Seltrecht, 2015a).

Academic Discipline: Evidence-Based Practice in Health and Nursing Professions

When comparing bachelor's' and master's programs the percentage of courses in health and nursing sciences is higher in the bachelor's program: Admission requirement for the master's degree program is the proof of 100 credit points (CPs) acquired in the field of health and nursing sciences. Consequently, students already completed courses to an extent of 100 CPs within a bachelor's program or can at least present 70 CPs from a bachelor's program plus a vocational training in the field of health or nursing, which is considered with 30 CPs. As the latter (exceptional) option is the rule with the Magdeburg program, all students except a few "exceptions" have a profession, that is they have been taught theoretical and practical knowledge and have received practical training. From a university didactical perspective, this fact is of relevance for designing the specialized parts of the master's degree program: In vocational trainings of health and nursing professionals, for instance, topics such as anatomy and pathology are addressed comprehensively and in detail. In addition, the vocational training of geriatric nurses dedicates 720 of 2100 hours to the focus of "Caring for the elderly in a way tailored to the specific individual and situation," which includes basic knowledge relevant for nursing, in particular anatomy, physiology, geriatrics, geriatric psychiatry, psychology, pharmaceutics, hygiene and dietetics. The training of physiotherapists encompasses a total of 2900 hours for theoretical and practical courses of which 240 hours are scheduled for anatomy, 140 hours for physiology, 30 hours for general pathology, and 360 hours for special pathology. This breakdown means that the focus in the two specialized seminars within the master's degree program is on scientific studies and findings from the context of health and nursing sciences, less on basics regarding medicine and nature sciences which can be considered existing (e.g., anatomy, pathology).

Within discipline-related scientific education the leading idea in the sense of university didactics is the *Concept of evidence-based practice* as this concept ensures that discipline-related contents will always be connected with the profession of the teachers at vocational schools or, respectively, with the occupational areas of the future health and nursing specialists. Using qualitative or quantitative studies current findings are communicated at the *macro, meso, and micro level*.

Within professional activities, in addition to acting towards a person needing care or therapy, also acting within one's own occupational group and coordinating with representatives of other occupational groups working on the case have to be considered. Therefore, also the profession-related theoretical concepts *arc of work* and *line of work* (Strauss, 1985; 1993; Strauss et al., 1985;) and that of the *negotiated order* are of relevance within the future teachers' studies of health and nursing sciences. In particular the concepts *arc of work* and *negotiated order* are directly connected with the basic knowledge of other related sciences, e.g., in the fields of communication sciences, science of management or law.

Discipline-related courses *focusing on health sciences* involve theories and models of health-related behavior, health support and the prevention or treatment, rehabilitation and palliative care (perspective on the target group), but also aspects of work and health protection and quality control as well as ethical aspects (perspective on the health care professionals).

Specialized courses *focusing on nursing sciences* concentrate on theories and models of nursing, health support and prevention (e.g., nursing activities with respect to preventive nursing, acute nursing, long-term nursing, palliative care, but also community-oriented nursing) (perspective on the target group) as well as quality management concepts relevant to nursing, basics of nursing ethics and work and health protection (perspective on nursing professionals).

Teaching Methodology for Health and Nursing

With teaching methodology courses, the *difference-theoretical approach of profession theory* is leading the way, according to which it is differentiated between profession as a structural category, professionalization as a process category and professionalism as a category of acting. In particular differentiating between collective professionalization and individual professionalization allows for tracing the developmental lines of health and nursing professions and the teaching profession on the one hand and the development of the individual health and nursing professionals or individual teachers on the other hand.

The introductory lecture of the teaching methodology course focuses on a close connection between theoretical concepts, approaches and theories of teaching methodology at the *macro, meso and micro level* and their specific relations to teaching practice (planning, realization, reflection and evaluation of lessons). Here, concepts relating to activities, cases, subjects and competences lead the way against the background of discipline-specific models of vocational didactics (e.g., subject-related nursing didactics, interacting nursing didactics, nursing didactical categorical analysis, action-theoretically based model of nursing didactics, critically-constructive didactics of learning areas in nursing, action-oriented simulation methods and experiments in the discipline of health).

The advanced seminar on teaching methodology for health and nursing focuses, against the background of case-oriented didactics, on the *concept of "double case reference" based on profession-theory*. The concept helps to specify the basics of teaching methodology and to test and reflect several methods and teaching approaches (for profession-theoretical foundation of the concept of "double case reference" cf. Seltrecht 2015a). The concept also allows for discussing both issues of educational activities in the context of teaching at universities which are relevant to teaching methodology (e.g., discrepancy between theory and practice in teaching activities or evaluation of group results). It also helps in preparing learning topics from the area of health and nursing practice under the aspect of teaching methodology for the training of health and nursing professionals. Another advantage of the concept is that it allows for working on key topics relevant to both teachers' acting and acting of health and nursing professionals, e.g., heterogeneity, inclusion, gender, intra-professional and inter-professional acting etc. At the end of the case-oriented seminars students will develop and test their own teaching concepts along theoretical lines (for practical realization cf. the concept of a teaching practice project by Seltrecht, 2015d).

Profession-Related Practical Studies

The training in teaching methodology within the vocational discipline of health and nursing in the first stage of the teacher training is completed by doing a school internship including preparation and evaluation and attending an accompanying seminar. At the center of the internship are the theory-based development of one’s own teaching concepts on the basis of an action-oriented inventory of methods as well as the development, testing and reflection of one’s own teaching attempts (cf. OVGU 2015, p. 13). During the profession-related practical studies students are to obtain an overview of the manifold tasks of teachers, several educational backgrounds and forms of training, as well as methods for analyzing and reflecting one's own acting as a teacher and that of others, and competence balancing. To do so, apart from one’s own first teaching attempts, students will sit in on classes given by the supervising teacher and other colleagues.

To ensure the training is both scientifically sound and practice-oriented, in addition to the concept of case-orientation the *concept of evidence-basing*, already familiar to students from seminars on health and nursing sciences, is introduced with a focus on educational activities. As this concept offers the possibility of extending internal *evidence* through external *evidence*, students are enabled to scientifically explore phenomena occurring in both educational practice and practice relevant to health and nursing that cannot be explained due to insufficient internal evidence, and find possible practical solutions (for the concept of *evidence-based teaching* and its use in the accompanying seminar cf. Seltrecht, 2015c).

Master's Colloquium for Final Theses that are Oriented on Teaching Methodology and Academic Discipline in the Vocational Discipline of Health and Nursing

Establishing an academic thesis follows a schedule closely related to the course of a scientific research project: After a first briefing between lecturer and student, students prepare an exposé on the research project. This product is presented and discussed in a colloquium. Then students work together at relevant points in the research process (start of data collection, empirically based dimensioning of topics, analyzing corner cases of qualitative research projects, presentation of results). Processing the data material takes a prominent role in the master's colloquium (for working methods in research workshops cf. Riemann, 2005).

Discussion

When developing the teaching concept for the discipline-related and didactical teachers' training in the vocational discipline of health and nursing, special attention was paid to interlinking theory and practice as well as to connecting academic discipline and teaching methodology. Consequently, alternative courses in the area of health and nursing sciences are offered so that students coming from the area of health sciences may profile themselves in the area of nursing sciences and students coming from nursing sciences may sharpen their profile in health sciences.

In the health and nursing sciences courses, relations between theory and practice and between academic discipline and teaching methodology are conceptualized against the background of the future vocational activities of the teachers at vocational schools: Studies of health and nursing sciences are related to areas of action in health and nursing professions by using the concept *evidence-based practice.* By relating to the areas of action, finally also relations to the educationally relevant areas of learning in the training for these professions become apparent.

In the area of teaching methodology in the vocational discipline of health and nursing, all courses are based on one another, each linking theory and practice. Here, also an inner differentiation takes place, so that students coming from a nursing profession will gain knowledge about health professions and vice versa.

Apart from the relationship between theory and practice within teaching methodology, also connections between academic discipline and teaching methodology are established in the courses on teaching methodology: On the one hand, case studies appearing in the (superficially qualitative) courses on health and nursing sciences in the context of the teaching methodology seminar on case-oriented didactics are taken up and included into the teaching concepts. On the other hand, the evidence-basing included in the health and nursing sciences seminars is taken up in the seminar accompanying the school internship through the concept of *Evidence-based Teaching*. First serving for developing internal evidence in the area of activities relevant to health and nursing, now the concept of evidence-basing refers to developing internal evidence in the area of educational activities (cf. fig. 4).

2 discipline-related courses: 1 module

- alternative courses for profile raising
- relation between theory and practice within the seminars through referring to areas of action
- connecting academic discipline and teaching methodology within the seminars through referring to learning areas.

3 courses in teaching methodology and 1 internship: 2 modules

- consecutive courses in teaching methodology
- inner differentiation within courses on teaching methodology for profile raising
- relationship between theory and practice within teaching methodology
- use of the case-orientation introduced in the health and nursing sciences seminars, now from the perspective of the "double case reference".
- Complementation of the concept of case-orientation by adding the concept of evidence-basing already known to students from health and nursing sciences, now in the form of *evidence-based teaching*

Figure 4. Relationship between theory and practice in academic discipline and teaching methodology, as well as connecting the academic discipline and teaching methodology.

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TEACHING NONLITERATE ADULTS IN ORAL CULTURES: FINDINGS FROM PRACTITIONERS

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ABSTRACT: Literacy is the gatekeeper to modern information. In the world today, approximately 740 million adults are excluded from adult education if that education uses literate instructional strategies. Nearly ¾ of a billion adults, many of whom speak unwritten languages, do not use reading to learn new information nor share information through writing. Most nonliterate adults live in oral cultures where information and culture are transmitted in the same way they have been shared for centuries, using oral strategies. Though becoming literate should be encouraged where possible, there are times, as the Ebola outbreak of 2014 illustrated, when literates need to share information with nonliterates quickly. This paper reviews some of the findings of a research study in which 54 literates who have experience teaching nonliterate adults without using literacy shared their perceptions of characteristics of nonliterate adults, personal competencies of effective literate instructors, and effective instructional strategies. Using a modified Delphi method, the researcher sought consensus from the participants on 85 statements concerning the topic of teaching nonliterate adults in oral cultures. By the end of the second round of questionnaires, the participants had reached a consensus, defined as an interquartile range of one or less, on 93% of the 85 statements.

Is illiteracy a disease? Writers for the United Nations Educational, Scientific, and Cultural Organization (UNESCO) have discussed the difficulty of eradicating adult illiteracy (UNESCO, 2014b). The inability to read and write has been tied to poverty, poor health, and social exclusion, while the ability to read and write is viewed as necessary for participation in modern society (UNESCO, 2013, 2014b).

Some writers for UNESCO have acknowledged that focusing on illiteracy has been a way for some to identify people by what they lack, an attempt to make others irrelevant by relegating them to the fringe of a culture (UNESCO, 2005b). Though some call for more research to inform literacy policy (UNESCO, 2014a), in many of the writings about literacy, there appears to be an assumption that literacy is the key to acquiring modern information and that without possessing this key, such information can be inaccessible and incomprehensible (UNESCO 2005a, 2005b, 2013, 2014b). Literates, as the ones with the key that can unlock information, are the "haves," and illiterates are the "have-nots." If teachers could be trained to use nonliterate methods to share modern information with adults who lack literacy, what would be the outcome? Would we see an amelioration of health issues, a decrease in poverty, and an interest in improved agricultural methods? Is it possible that in adult education, we have focused more on a way to share information (literacy) than on the information itself?

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This paper summarizes and discusses some of the findings of a descriptive study, a study conducted to gather insight from experienced practitioners regarding teaching nonliterate adults in oral cultures (Thompson, 2015). In a descriptive study, the investigator does not manipulate variables but seeks to acquire and document information in order to establish a foundation for future research (Cook, Rumrill, Webb, & Tankersley, 2001; Shavelson & Towne, 2002; Szymanski, 1993). This descriptive study was undertaken to gather information from literates who have used oral methods to effectively share information with nonliterate adults in oral cultures.

The research questions were:

> What do literate instructors perceive as the characteristics of nonliterate adults within oral cultures?
>
> What personal competencies do literate instructors perceive increase their teaching effectiveness with nonliterate adults within oral cultures?
>
> What do literate instructors perceive to be effective instructional strategies when teaching nonliterate adults within oral cultures?

Because of the negative stigma associated with the term, "illiterate," the term "nonliterate" was used in the study and will be used in this paper. A nonliterate adult is one "who cannot receive information by reading and who does not communicate with others through writing" (Thompson, 2015, p. 6).

It is ironic that literates must use writing to educate other literates about the needs of nonliterate adult learners as nonliterates do not write about their own learning needs. Such education is necessary, however, because literacy has become the gatekeeper for modern information. It appears there is an assumption that if people were interested in modern information, they would become literate, and once literate, they would then have access to modern information. It appears there is also an assumption that once people have access to information, they will use such information to ameliorate their lives. Does literacy equal access? Without entering into a discussion as to what constitutes a better life, usually defined in relation to Western values, it is unknown whether nonliterates would put modern information into use because such information has largely been offered to them through only one avenue - literacy.

Though literacy definitions vary from country to country, all definitions include the ability to read and write. Some countries also require individuals to have a particular level of schooling before they can be considered literate (UNESCO, 2005a). In 2003, because of the difficulty of ascertaining progress in the global literacy rate due to countries' varying definitions of literacy, UNESCO convened a conference where an expert panel, in a later publication, defined literacy as:

> … the ability to identify, understand, interpret, create, communicate and compute, using printed and written materials associated with varying contexts.

> Literacy involves a continuum of learning in enabling individuals to achieve his or her goals, develop his or her knowledge and potential, and participate fully in community and wider society. (UNESCO, 2005b, p. 21)

When a culture is based and dependent upon literacy, people in that culture may be unaware of oral cultures, “a society where its members value oral tradition and use oral instructional strategies for teaching, communication, or the transmission of culture” (Thompson, 2015, p. 7). In literate cultures, nonliterates are usually preschool children or those who have a developmental issue that prevents them from learning to read. It can be easy for those from a literate culture to assign childlike characteristics to nonliterate adults or to see them as developmentally challenged. However, UNESCO (2014b) estimates that there are 774 million nonliterate adults in the world today. Some adults speak a language that has never been written. A living language is a language that is the mother tongue of at least one person. Linguists estimate that over 3,500 living languages exist today that do not have a developed writing system (Lewis, Simons, & Fennig, 2014). Are all adults who speak an unwritten language or who follow an oral tradition childlike or developmentally challenged? Could it be that these adults operate in cultures foreign to our own as they transmit knowledge and culture orally in the same way their people have done for thousands of years? Could it be that many literates are the ones who are childlike and challenged when it comes to understanding oral cultures?

In today’s world, it would be difficult to find a culture untouched by writing. In buying a soft drink or filling a prescription, one is confronted by the written word. Widespread literacy has been linked to the rise of individualism, decentralized government, and objectified knowledge (Thompson, 2014). No one can deny the benefits of becoming literate, and people should become literate whenever possible. Global organizations such as UNESCO as well as local governments must continue their efforts to encourage literacy. Equally important for the global stage, however, is equipping literates to enter the world of the nonliterate to share modern information using instructional strategies that are effective in oral cultures. The Ebola outbreak of 2014 showed us this need.

Original Study: Participants and Data Collection

How does one develop a foundation of knowledge about an unexplored phenomenon? In descriptive studies, surveys are often used when investigators want to measure a phenomenon but would have difficulty observing it (Cook & Cook, 2008). A survey can be taken of a random sample in the belief that the views of the sample represent the views of the larger population to which the sample belongs. The population of literates who have experience teaching nonliterate adults in oral cultures is unknown, however. Because the investigator wished to form a knowledge base by leading those who have experience teaching nonliterate adults in oral cultures to come to consensus on basic information, and because the participants lived in various parts of the world, often in remote areas, it was decided that a modified Delphi method was the best research vehicle for this study.

The Delphi method, a research tool employed to gain consensus on an issue from those qualified to comment, has been in use for over five decades. Begun as a method to obtain a consensus from experts on their views of future phenomena, the method has evolved into a way of gathering knowledge from diverse experts who remain anonymous to each other. In the Delphi method, experienced participants are formed into a panel and respond to a series of succeeding questionnaires until consensus is reached (Garson, 2014; Landeta, 2006). The traditional Delphi method begins with open-ended questions about the topic of study with responses to these questions leading to formulated statements. In the modified Delphi method, the investigator uses the extant literature to develop statements, presenting these statements to the panel for their responses (Johnston et al., 2014; Weatherman & Swenson, 1974; Zunker & Pearce, 2012). Responses are collated and questionnaire rounds continue until the research questions are answered or the investigator determines enough information has been exchanged.

For this study, fifty-four participants with varying levels of experience in different geographical regions shared their perceptions of teaching nonliterate adults in oral cultures. The study was concluded after two rounds of questionnaires. Participants that made up the panel were recruited using snowball sampling as practitioners forwarded a recruitment email to those they knew were currently teaching or had taught nonliterates. The following table gives the demographic characteristics of the participants. There were no participants below the age of 30.

Table 3

Demographic Characteristics of Participant Panel (N = 54)

Characteristic	*n*	%
Sex		
Male	23	43
Female	31	57
Age		
30 – 39	8	15
40 – 49	2	4
50 – 59	25	46
60 or above	19	35
Level of Experience		
Novice	8	15
Experienced	46	85
Locations Where Nonliterates Taught		
Africa	45	83
Asia and Pacific	9	17
Arab States	3	6
Europe and North America	2	4
South and Latin America, Caribbean	5	9
Topics Taught to Nonliterate Adults		
Agriculture	8	15
Bible	53	98
Church	28	52
Community Health	24	44
Government	1	2

Individual and Family Health	23	43
Job Skills	6	11
Literacy	18	33
Marriage and Family	18	33
Music	7	13
Other: Special Needs Education	1	2

Note. Percentages are over 100 because some participants taught multiple topics in multiple locations. Reprinted from *Perceptions of Teaching Nonliterate Adults in Oral Cultures: A Modified Delphi Study*, p. 74, by L.W. Thompson, 2015.

Through a review of the literature, the investigator identified 15 competencies involved in teaching nonliterate adults and prepared 66 statements related to these competencies. In Round One, the participants were asked to respond to the 66 statements using a 6-point Likert-type scale from “strongly disagree” to “strongly agree.” The participants were also asked to include comments or provide other statements that could be presented to the participants in a subsequent second round questionnaire. In Round Two, the participants were shown the round one questionnaire results. Those responses which had reached consensus, defined as having an interquartile range of one or less, were noted. Participants were shown not only the groups’ responses but reminded of their own responses so that each participant could compare his or her responses with those of others. In Round Two, participants could change their responses to the round one questionnaire if they wished. Nineteen additional statements were suggested by the participants or developed from comments following Round One. These new statements were presented to the participant panel for their responses in Round Two. Fifty-three panel members participated in Round Two. Thus, participants who took part in both questionnaire rounds responded to a total of 85 statements. After the first round, 51 of the 66 (77%) statements reached consensus. At the end of the second round, 79 of the 85 (93%) statements had reached consensus. Included in the original study is an analysis of each of the 85 statements as well as the participants’ responses categorized by their sex, experience-level, and whether or not their teaching experience was in Africa or in other global regions.

Findings cannot be generalized to all nonliterate adults or literate teachers of nonliterate adults in oral cultures. Each nonliterate adult and each teaching situation is unique. Though not every participant was familiar with every concept or agreed with every statement, the participants reached consensus on many characteristics of nonliterate adults, personal competencies that help a literate instructor be more effective, and instructional strategies that the participants have used and found to be effective in teaching nonliterate adults in oral cultures. The following discusses some of those findings.

Findings: Characteristics of Nonliterate Adults

The participants’ responses painted a picture of the nonliterates with whom they had come in contact. The statements about nonliterate adults with which the participants were in agreement were those statements that pertained to the importance of oral language in the life of nonliterate adults and the relationship of nonliterate adults to their culture and modern society.

Concerning the place of oral language, the participants had found that nonliterate adults appreciated the beauty and sound of language and often distinguished themselves from each other by their ability to use language. Children in oral cultures, who have not yet mastered the ability to sprinkle their speech with proverbs or stories, must speak directly. Flowery and circuitous language as well as melodramatic bantering are the marks of adults. Specialists, with years of training, may advance to become verbal artists and are appreciated for their verbal prowess. Participants strongly agreed (67%) or agreed (26%) that among nonliterates, the relationship between the person giving a message and the person receiving it is an integral part of the communication process.

Oral cultures are necessarily collectivistic cultures because nonliterate members must depend upon each other for information (Thompson, 2014). Participants perceived that nonliterate adults view isolation from the group as punishment. Knowledge consists of what the adults can bring to mind, though each person is unique and varies in his or her memory ability. Knowledge is accrued over time, and elders, as those who have been alive longer and thus have greater stores of knowledge, are respected in traditional cultures. Each individual has a role which he or she must exercise for the good of the community. Infants are expected to have easy access to their mothers, and rather than separating children from adults, children “hang around” adults, observing and absorbing what they can, shooed away only if they become rowdy or too distracting. Specialized knowledge such as that used by midwives, healers, tailors, potters, and others, is usually learned through apprenticeship. Such knowledge may take years to acquire and is practiced for the good of the group. Secret knowledge is not shared with just anyone but is passed on to those deemed worthy to receive it, a worthiness often defined by one’s position at birth rather than merit.

When it came to the relationship between nonliterate adults and the literate world, participants disagreed with each other. Though 15% of the participants strongly agreed and 30% agreed that nonliterate adults were conscious of living in a literate world, another 40% of the participants only slightly agreed with this statement. Another 6% disagreed and 8% slightly disagreed that nonliterates are aware of the literate world. Participants agreed that nonliterate adults believe their way of knowing is not respected by literates. One participant commented that literates often think of nonliterates as “hillbillies.” Participants agreed that nonliterates believe that their children are exposed to cultural values in school that differ from their own. Participants did not reach consensus as to whether nonliterates feel they have more freedom than literates. Some participants believed the nonliterates with whom they came in contact believed they had more freedom than literates whereas other participants believed nonliterates felt their lack of literacy was a hindrance. One participant commented that nonliterates generally belong to an ethnic group that has been the object of discrimination or excluded from governmental power. A statement to this effect was formulated and presented to the participants in the second round. The median response of those with non-African experience was “Agree,” though those with African experience only slightly agreed with this statement. Participants agreed that the nonliterates they knew were more accepting of the pain of life such as hard physical labor or extreme temperatures than literates. Participants also agreed that nonliterate adults participate more fully in a development project if they believe the project corresponds to their felt needs. One participant commented and in Round Two the other participants agreed that nonliterate adults may participate in development projects even if they do not believe it corresponds with their needs if they think that by doing so they can build relationships and have their needs met in the future.

Findings: Personal Competencies of Effective Instructors

Participants acknowledged that literate instructors who are effective in teaching nonliterate adults in oral cultures respect nonliterate adults and value oral cultures, are conscious of their own ineptitude in oral cultures, and create teaching environments that cater to the needs of the students rather than their own needs. Asked to comment about how they knew their teaching was effective, many of the participants reported that they had personally witnessed changes in nonliterates' lives as information that had been shared was put into practice.

Almost all of the participants (92%) strongly agreed or agreed that effective literate instructors value oral cultures. Participants strongly agreed that effective instructors investigate the local culture and demonstrate cultural awareness. One participant commented that a teacher's effectiveness is directly tied to how much one values oral cultures in that the more one respects nonliterate adults and values oral cultures, the more effective one will be. A statement to this effect was formulated and presented to the participants for their response in the second round. Fifty-seven percent of participants strongly agreed with this statement and 40% agreed with it.

The participants agreed that their own literacy prohibited them from totally understanding their nonliterate students or mastering the oral skills exhibited by their students. The participants strongly agreed that the role of the teacher is based upon the relationship between teacher and student and agreed that the student expects to have access to the teacher's daily life outside of the teaching situation.

Participants agreed that effective literate instructors create learning situations with their nonliterate adult students' needs in mind, including helping their students navigate the literate world such as understanding warning signs or health care instructions. Effective instructors are aware of their students' difficulty in using literacy-based tools such as pencils or literate teaching methods such as sequencing or drawing. Participants agreed that effective literate instructors create teaching environments where community children "hanging around" are not considered a distraction.

A comment from a participant in the first round led to a statement that was presented to participants in the second round concerning the need for an effective instructor to have "patience, patience, patience." Participants strongly agreed (60%) or agreed (34%) with this statement, and no participants disagreed with it. Participants also agreed with statements presented to them in the second round that effective literate instructors exhibit oral strategies in their own lives, such as speaking in stories and proverbs, and create environments where instead of coming across as a teacher, they orchestrate teachable moments in which learning "happens."

After the first round, a participant comment about working with local literate translators led to the following statement that was presented to the participants in the second round: "Literate adults who are effective instructors of nonliterate adults, when using a local, literate translator, must be aware of their translator's attitude toward nonliterate adults and their learning needs" (Thompson, 2015, p. 127). Fifty-seven percent of the participants strongly agreed with this statement and 40% agreed with it.

Findings: Effective Instructional Strategies

The participants responded to statements concerning effective instructional strategies and learning processes that literate instructors can use with nonliterate adults in oral cultures. Though the participants agreed as to the efficacy of traditional oral methods such as stories, proverbs, and songs, the participants disagreed about the usefulness of some methods tied to technology such as video and audio recordings.

Concerning the use of stories, 72% of the participants strongly agreed and 24% agreed that effective literate instructors use stories to help their students organize and store knowledge. They also strongly agreed that storytelling is effective in helping adult nonliterates learn new knowledge. Participants agreed on the efficacy of proverbs, objects, landmarks, songs, apprenticeship, and events to help nonliterate adults learn, organize, store, and recall information.

After participant comments in Round One about other instructional strategies they had found effective, new statements were presented to the participants in Round Two. The participants agreed that games were helpful in building relationships and teaching. Demonstrations, drama, and role play were also mentioned as effective instructional strategies.

Participants agreed that cell phones could be used to help nonliterates learn new information and that interactive radio programming created for nonliterates was more effective than programming that began with a written text or was tied to literacy. Participants could not reach consensus about the efficacy of video recordings and only reached consensus on audio recordings, agreeing on their usefulness, after Round Two. Some participants noted the lack of electricity in their areas which made the use and maintenance of technology difficult and commented that, rather than depend upon technology, using traditional oral instructional strategies was more reliable when sharing information.

One participant's comments led to this statement that was presented to the participants in Round Two: "Literate adults who are effective instructors of nonliterate adults are conscious of the needs of nonliterate adult learners when there are also literate adults in the group who monopolize teaching time to proudly demonstrate their literacy" (Thompson, 2015, p. 144). In Round Two, 42% of the participants strongly agreed with this statement and 49% agreed with it. No participants disagreed with the statement.

Conclusion

In this paper, some of the findings of a research study were shared, a study in which 54 experienced literate practitioners responded to 66 statements presented to them in a first round questionnaire. In the second round, only one of the 54 participants did not respond. In this round, the participants were given the opportunity to stand by their responses or change their first round responses. An additional 19 new statements developed from participants' comments were presented to the participants. At the end of Round Two, 93% of the 85 statements had reached consensus.

As stated earlier, findings cannot be generalized to all nonliterate adults or all effective literate instructors of nonliterate adults. However, the fact that 54 practitioners or retired practitioners were easily found who were willing to participate in the study is evidence that there are literates who share information with nonliterate adults in oral cultures without using literacy. A perusal of the participants' demographic information shows that almost all of the participants had at one time taught Bible. While understanding and meeting the learning needs of nonliterate adults has been a topic of study for over 30 years in the Christian mission community, it appears that in academia, research into how best to equip literates to enter oral cultures to share modern information has not been considered. One religious educator remarked, "Anthropologists and missionaries are addressing orality's impact on the teaching–learning process; surprisingly, educators are not" (Marmon, 2013, p. 312).

Just as adult educators in the literate world can agree on general characteristics of their students while at the same time realizing that not all of their students will fit the profile, so the participants in this study were able to reach consensus on the characteristics of their nonliterate students. They also agreed on personal competencies of effective instructors and effective instructional strategies. Key to their findings were the themes of value and respect. Rather than seeing their students as deficient and their nonliteracy as a disease, the participants believed that their effectiveness was directly tied to how much they as teachers respected nonliterates and valued oral cultures. Effective instructors, as literates, were aware of the limitations their literacy created in that most felt they could never truly understand or identify with their nonliterate adult students nor master some of the oral skills their students took for granted.

Surprising in the study was the participants' reaction to local literate translators as well as their teaching experiences when local literate adults and nonliterate adults were taught together. In much of the development world, it appears there is an assumption that speaking the local language is the main criterion for effective communication when an outsider wishes to communicate with an insider. This study suggested that just speaking the local language is not enough and may even be a hindrance, even if the translator is of the same ethnic group. If the translator is literate, he or she must also understand nonliterate adults and treat them with respect. Some participants noted that in their experience, when nonliterate adults were taught in the same group with adults who were literate or becoming literate, the focus often switched from the information being shared to an opportunity for some adults to showcase their growing literate ability, and nonliterate adults' learning needs remained unmet.

The possibilities for future research on this topic are endless. Research comparing the results of projects that meet nonliterate adults' learning needs and those that do not are needed. Research is needed to evaluate whether giving nonliterate adults access to information using oral strategies empowers these nonliterate adults to act on the information.

International development projects must be systematically evaluated to see if they are "nonliterate friendly." Local governments must evaluate their adult education programs to see if they are actually sharing information or are instead spending time and resources sharing a learning method. The world has not yet seen what might happen when literacy is no longer the gatekeeper to modern information.

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EVOLUTION AND REVOLUTIONS OF ADULT LEARNING: CAPACITY BUILDING IN ADULT AND NON-FORMAL EDUCATION IN NIGERIA

Chinwe U. Ugwu[1]

ABSTRACT: The National Commission for Mass Literacy, adult and Non-Formal Education (NMEC) is the Federal Statutory Agency set up to co-ordinate all aspects of Non-Formal Education in Nigeria whether offered by government agencies or non-governmental organisations. This study looked at the existing Capacity Building Programme, the delivery methods, impact and achievement as well as the challenges. One of the challenges is lack of adequate, well trained and qualified personnel at the Federal, State and Local Government levels. NMEC should organise training for staff on Monitoring and Evaluation. The researcher also recommended that more facilitators should be recruited.

Keywords: Literacy, Development, Capacity building, Sustainability

The amorphous nature and essence of adult and non-formal education is such that its boundaries cannot be easily demarcated. Many nations have attempted the eradication of illiteracy to a tolerable barest minimum. This has become necessary since the industrial and technological take off, countries like Tanzania, Nigeria and South Korea and many others require literacy as a prerequisite for its attainment. The literate member of society is more likely to take an active and effective part in the development process (Indabawa, 1991).

The role of adult education in development is multidimensional as one of the building blocks of human development, and not just a basic right, education is a foundation for progress in areas such as human capital, health, nutrition and the development of institutions and democracy. The economic role of adult education can be seen in its contribution towards human capital formation. Adult education provides more investment climate and it is very critical for labour force and providing managerial know-how, able to compete in today's global context and it also plays a major role in social development. The role of adult education is not limited to the economic and social spheres. It also has a political dimension. There should be a strong link between adult learning and democracy. This is so because, as acknowledged at the UNESCO fifth International Conference on Adult Education held in Hamburg in 1997, "substantive democracy and a culture of peace are not given, they need to be constructed" (cited in Seya, 2005, p. 106). For democracy to be achieved, adult education is needed to educate citizens on the democratic culture as well as inform them of their rights and responsibilities as democracy also requires people to actively participate at local, national and international levels.

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The Concept of Adult Education

Adult and non-formal education in Nigeria began with the creation of man on the planet earth. It was imperative for those forebearers in Nigeria to provide education for the adult population so as to ensure the survival and development of skills, integration, group cohesion, social values and acceptable attitudes, Omolewa (2000). The concept of adult education is difficult to define hence people define it from different perspectives. Scholars, have agreed, however, that it is an education that has adults as its clientele. Different parameters have been used in defining an adult among which are, biological, chronological, historical, psychological, economic, political and sociological among others. Nzeneri (2002) defines as adult as one who is physically and psychological matured and in socially, economically and politically responsible. According to Adesanya (2005), the term adult is difficult to define because it varies from one society to another and has changed over time. The boundaries that determines who is considered an adult can depend on actions, that is legal age to fight war, drive a car and vote among others; activities, that is age that one can begin to work, and/or responsibilities, that is marriage age, age to begin supporting family.

UNESCO (1976), cited in Nzeneri (2005, p. 10), defines adult education as

> the entire body of organised educational process, whatever the content, level and method, formal or otherwise, whether they prolong or replace initial education in schools, college, Universities as well as in apprenticeship whereby persons regarded as adults by the society to which they belong, develop their abilities, enrich the knowledge, improve their technical or professional qualifications and bring about changes in their attitude or behaviour in the two fold perspectives of full personal development and participation in balanced and independent social, economic and cultural development.

The above definition is encompassing in the sense that it has not only defined adult education, but has gone to the extent of talking about its scope and content.

Concepts of Capacity Building

There is growing recognition of the fact that adult education is of vital importance for the future of every democratic society particularly in developing economies. Capacity building is an important aspect of adult education to meet with the challenges of industrial and technologies of the world today. The improvement of adult learners, instructors/facilitators, infrastructure and management in adult education is of paramount importance to the stakeholders in the field. However, the development of capacity building in adult and non-formal education will bring about greater empowerment and goal-oriented results in individuals and communities.

According to Michelle (2005), capacity building is used in numerous contexts to describe a wide array of activities. In most general terms, capacity building consists of an organisations ability to solve its problems and achieve its stated objectives. This involves skills transfer, human resources management, organisational development and strengthening of communities and social network. Michelle outlines the definition as follows:

- It is the process aimed at improving the skills of individuals, groups, organisations, institutions and communities for carrying out key functions, solving problems, defining and achieving objectives and understanding and dealing with the requirements needed to manage these matters sustainably.
- The process aimed at strengthening the skills of an organisation or group of organisations to improve their performance and functioning.

Phil (2007), explains capacity building as an increase in the ability of social organisations to the goals that are set be that organisation and also to improve the strength of the organisation which will impact on everyone's performance on the job.

Adult and Non-Formal Education

Adult and non-formal education is seen in the following ways globally:

1. The Dakar framework of action, which reaffirmed the Jomtien declaration (WCEFA, 1990), expanded the vision of basic education in two of its six goals.

    - Goal 3: Ensuring that the learning needs of all young people and adults are met through equitable access to appropriate learning and life skills.

    - Goal 4: Achieving a 50 percent improvement in levels of adult literacy by 2015, especially women, and equitable access to basic and continuing education for adults.

2. The focus on gender equality, women and the problems of HIV/AIDS pandemic within these frameworks implies, in principle, ample space for attention into the basic learning needs of adult women and men.

3. The Millennium Development Goals 3 "to promote gender equality and empower women" literacy is a fundamental skill to empower women to take control of their lives, to engage directly with authority and give them access to a wider world of learning. Educating women and giving them equal rights is important for many reasons. It increases their productivity, it promotes gender equality, educated women do a better job caring for children and many more

4. The United Nations Literacy Decade (UNLD), 2003 – 2013, approved by the UN General Assembly in December, 2001, offered a cross-cutting platform for reviving Adult and Non-formal education. It proposed a renewed vision of literacy, in which creating literate environments and a literate society is seen as a goal. The Literacy Decade was launched for the following reasons: Literacy is at the heart of basic education for all and creating literate environments and societies is essential for achieving the goals of eradicating poverty, reducing child

mortality, curbing population growth, achieving gender equality and ensuring sustainable development and democracy (United Nations, 2001, cited in Lind,2007, p.212).

5. United Nations Educational, Scientific and Cultural Organisation (UNESCO), prepared a programme of action to increase literacy learning opportunities within the framework of UNLD called Literacy Initiative for Empowerment (LIFE). The plan is to assist 34 countries with a literacy rate of less than 50% or an illiterate population of more than 10 million. In the foreword of the LIFE vision and strategy paper (UNESCO, 2005,p6), the Director General explains, while UNESCO will provide the overall framework of coordination, support and mobilization, LIFE operations will be country-led, respond to the country-specific needs and priorities, strengthen national capacities and be embedded in national development frameworks. Care will be taken to build on existing national best practices and scale up on-going programmes of proven effectiveness. With UNESCO's assistance, each country participating in LIFE will take stock of its specific needs and develop a corresponding strategy.

Capacity Building Programmes in Adult and Non-Formal Education

The non-formal education intervention programmes involves capacity building in all technical aspects which include: apprenticeship training in trade and craft, mechanic, soap-making, tie and dye, carpentry, tailoring and agricultural practices such as animal husbandry, fish breeding and pig rearing to mention a few. These non-formal education programmes contribute positively to development of people in the form of acquired basic functional and vocational skills, self-reliant, improved socio-economic skills, integration into society and will eliminate poverty, precarious conditions and status.

UNESCO (2005) identified the following programmes as areas of concentration in capacity building activities;

- Planning and management
- Curriculum development and designing materials (promoting quality contents)
- Training of trainers and facilitators
- Monitoring and evaluation
- Promoting local community responsibility
- Creating rich relevant literate environment with respect to gender, linguistic and cultural diversity through modes of delivery including information communication technology (ICT) and community learning centres.
- Linking formal and non-formal adult education.

The proactiveness of adult and non-formal education in the development of human and material resources cannot be over emphasised. The National Commission for Mass Literacy, Adult and Non-formal Education (NMEC) is the federal statutory Agency set up to coordinate all aspects of Non-formal Education in Nigeria. This feat involves the coordination and monitoring of government agencies, academic institutions and non-governmental organisations participating in NFE programmes. Its establishment was predicated upon the National policy thrust and the need to eradicate illiteracy amongst the citizenry. It is also designated to carryout research and training in relevant fields for NFE personnel in order to enhance their output. This initiative was further reinforced by the Jomtien and Delhi Declarations where member nations of the United Nations accepted to eradicate illiteracy by the year 2000 to facilitate development. The commission was formally launched on 25th June, 1991 with the basic responsibility of eradicating illiteracy in Nigeria. In discharging the responsibility, different categories of personnel involved in the NFE programmes must be empowered continually. These personnel include facilitators, change agents, organisers, supervisor, administrators, policy makers and researchers. As of 2007, there were 150 professional staff members in NMEC Headquarters, the six zonal offices and the National Centre in Kano that is coordinating the work of less than 22,946 (2010 staff census) staff of the thirty-six states and the Federal Territory Capital (FCT) agencies for Adult and Non-Formal Education in Nigeria.

The related capacity- building of the commission includes the following:

- Organise in-service professional training courses for senior staff and operate training seminars for various levels of staff from government and non-government organisations;

- Conduct research in various fields such as curriculum development, learning and teaching methodologies, appropriate educational technologies, motivation of learners and instructional materials and needs assessment;

- Organise annual conferences of Heads of Adult Education Departments in State Ministries, Agencies and Institutions of higher learning.

- Organise writers' workshops in order to develop and promote teaching and learning materials in various languages, especially for primers, graded readers, including follow-up reading materials, posters, audio-visual materials and flash cards.

- Run national and international training workshop and seminars and also act as a coordinating and clearing house for national training for Mass Literacy, Adult and Non-Formal Education; and

- Organise conference, workshops, symposia, lectures and seminars on topical issues related to Mass Literacy, Adult and Non-formal education on a regular basis.

Besides NMEC, there are a number of Universities, Polytechnics, and Institutes that provide initial training, in-service training and re-training opportunities for Adult and Non-Formal Education personnel in the country. They run certificate and Diploma courses and Undergraduate and post-graduate degrees in Adult and Non-formal education. Staff members are also provided with opportunities to attend short courses, workshop, seminars and conferences on Adult and Non-formal Education at the National and International levels with the assistance of development partners such as the UNDP, UNESCO, UNICEF, USAID, JICA, BRITISH COUNCIL ACTIONAID and ILO.

Objectives

The Objectives of capacity building are to ensure that:

- Well trained and qualified Adult and Non-Formal Education personnel are available at Federal, state, local Government and learning centre levels.
- Adult and Non-formal education personnel have opportunities for pre-service and in-service training.
- Adult and Non-formal education establishment and organisations have adequate infrastructures, equipment and instructional materials.

In focusing on the objectives and goals why the NMEC was established, the Department of Planning Research, and Statistics, of NMEC Abuja Office organised a programme in 2012 tagged, The Literacy by Radio vision document and the National Economic Empowerment and Development Strategy (NEEDS) to underline the importance of literacy as a vehicle of both individual empowerment and national development. National Literacy Survey (2010), conducted by the National Bureau of Statistics in Nigeria estimates the adult literacy rate as 71.6% with huge variations between states, regions and sex (male 79.3% and female 63.7%).

In the light of the existence of a large number of non-literate people in Nigeria, the National Commission for Mass Literacy, Adult and Non-formal education (NMEC) felt a need to seek other viable means of reaching the teeming population of non-literates. The selected medium to achieve this feat was the mass media. Consequently, with the assistance of UNESCO, UNICEF and other government agencies, the “Literacy by Radio” programme was launched in 2004. “Literacy by Radio” is a strategy for effective delivery of literacy and basic education to a large number of learners spread over a large location. The general objective of the Literacy by Radio project is to evolve a fast and effective approach to eradicating illiteracy in the country in furtherance of the Education for All (EFA) and Millennium Development Goals (MDGs). Specifically, the objective of literacy by radio is to increase access for adult and non-formal education learners to opportunities for basic literacy, which will in effect increase the reading, writing and computing skills of all adult literacy learners--irrespective of age, gender, socio-cultural, and economic circumstance--in order to improve the quality of human life and national development.

Funding of the Literacy by Radio programme is provided by the National Mass Education Commission with financial support from UNESCO and UNICEF. The two organisations also assist NMEC with the necessary technical support in the implementation, management and coordination of the programme. A national task force was formed, comprising UBEC, NUNE, FRCN, FME, NATCOM non-formal education in Nigeria. The commission has, since 1992, championed the implementation ofthe "Each-one-Teach-One' (EOTO) model of literacy delivery, supported NGOs in the implementation of literacy programmes, and provided training. UNESCO, UNICEF and NBC was also targeted to advise on the implementation of the project.

Developing Adult and Non-Formal Education Programmes through Capacity Building

Some of the adult and non-formal education programmes include:
Functional literacy training, which is the combination of literacy education and socio-economic activities. It is selective and designed for a group of people within the same socio-economic activity. It is directed towards people who cannot write, read and compute, but need these skills for effective performance of their social and economics roles.

Functional literacy may be organised for a group of community leaders, rice sowers, cocoa farmers, market women, mechanics, furniture makers, panel-beaters, welders and many more. This program will develop their capacity skills in the profession.

- **Extension education:** universities are primarily set up for teaching and research programmes and to provide community services to the people through discrimination of new findings from research. Different ministries like health, agriculture, education, formulate policies that would help in the improvement of health, agriculture and education to boost the economic standard of the people.

- **Agricultural extension education:** innovations in both methods and techniques of production as well as a new improvement in agriculture are brought to the knowledge of the farmers through mass media.

- **Health education:** Training on health issues are also organised according to Lewis (as cited in Clement, 2009); the wealth of a nation does not depend on her wealth or her resources, but on the health and happiness of her people. Health extension education is an instrument for preventive health care. Some examples of such programmes are expanded programmes on immunization (EPI), Oral

Rehydration Therapy (ORT). The health awareness keeps the populace health in order to attain to the height of their potential skills.

- **Women education:** This programme exposes women to the happenings around them and helps them play their roles in the society more productively. The training of women helps them improve on their roles, develop their skills and empowers them to be self-reliant.

- **Retirement and pre-retirement education**: Clement (2009), expressed that this education empowers retirees to be productive even after their retirement at their different establishments, thus developing their capacity to be productive to themselves and the society.

- **Civic education:** This initiative involves programmes that are directed towards the improvement of the socio-cultural and political development of the people. It also involves the identification and mobilization of human and material resources available in the community and channelizing them for the development of betterment of the standard of living of the people.

Conclusion

Obviously, there are various non-formal education programmes used and adopted for self-reliant development, but what is lacking is contemporary capacity building strategies of non-formal education and the absence of a model that conceptualizes the skills acquisition process. Capacity building in adult and non-formal educational is aimed at improving adult education programmes to accommodate the changes and challenges facing adult and non-formal education through training and retraining facilitators and acquainting them with current issues that will empower and improve their productivity.

Recommendations

The stakeholders' intervening variables should involve motivation by government and non-governmental agencies through the provision of incentives, setting up of skills acquisition centres, mobilization through public enlightenment campaigns. Also included should be payments of allowances to trainees by support agents, such as individuals, multi-nationals; corporate bodies, community based organisation (CBO) and voluntary agencies.

- Creating conducive environments to enhance learning on the part of the trainers and trainee.

- Recruiting and training community facilitators at national, state and local levels.

  Training of more staff in computer literacy to empower them to write some and share monitoring reports regularly.

- Organising by NMEC, of e-training for staff in monitoring and evaluation on a regular basis

- Recruiting more facilitators and adhering to minimum qualification.

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EVOLUTION AND REVOLUTION OF ADULT LEARNING: EXPOSITION OF OPEN AND DISTANCE LEARNING IN NIGERIA

Nneka A. Umezulike[1]

ABSTRACT: The educational system has witnessed a number of laudable programs since inception in both formal and non-formal systems of education programs that were set up to empower adult educational skills, knowledge, decision- making processes.Correspondence education transformed into distance education which--with the advent of information and communication technology--is being referred to as Open and Distance Learning. The study looked at some of the existing Distance Learning Institute initiatives and other programmes in Nigeria. The programmes include National Teacher Institute (NTI) and Degree programme through Open and Distance Learning (OPL) in some universities including National Open University (NOUN) degree programmes. The researcher used descriptive survey to examine the institutions involved in Open and Distance Learning in Nigeria. The following were examined: their goals, scopes, successes, failures and challenges. The researcher recommended among other matters, that there should be academic collaboration between Nigerian Federal Universities and Open and Distance Learning Institutions in Nigeria.

Keywords: Correspondence, Open and Distance Learning, Information and Communication Technology

Adult education in Nigeria, having experienced a comeback following the independence and increasing prosperity of many Nigerian states, poses specific requirements on policy makers and planners to take into consideration indigenous cultural traits and characteristics. With a moderate backlash against western ideals and educational traditions, many universities and other institutes of higher education take it upon themselves to develop a new approach to adult and higher education. Non-formal education no doubt plays complementary and supplementary roles to the formal school system. The higher premium placed by government on formal basic education without commensurate attention to non-formal education is likely to inhibit the achievement of the desired results of the goals of education for all (EFA) and Sustainable Development Goals (SDGs). In essence, adequate attention has to be paid to non-formal basic education considering the large population of non-literate Nigerians that it is meant to serve.

The central position of Non-Formal Education (NFE) in the development of individual and society accounts for the conception of distance learning. It entails an in-depth discourse of policies and practices of non-formal education in Nigeria. Huge numbers of individuals need quickly to be provided with Basic Education especially through the Non-Formal Education system. Providing this type of Basic Education willensure the useful knowledge necessary to lead and acquire productive, healthy and dignified lives.

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Open and distance learning (ODL), according to UNESCO, (1997) is the most remarkable development in the field of education and training of recent years. The history of distance Education started when the university extension movement, or what another school of thought regarded as University Extra Mural Non-Formal Education, was founded.The goal of James Stuarts was to bridge the gap between the ivory tower represented by the British Universities and workers, including the masses of the then British Society. James Stuarts and his group members experimented with correspondence education for women who were marginalised in Britain in the 19th century, which coincided with the period societies were organising correspondence education for women in England and United States of America. The correspondence Education later transformed into distance educationand with the advent of Information and Communication Technology (ICT) is now known as Open Distance Learning (ODL). Open Distance Learning has become increasingly popular with the emergence of radio, television and information and communication technology and communication technology for education instructions.

Open and distance learning is therefore a form of non-formal education through which organised learning activities and opportunities are provided to learners who study individually. Peters (2001) who developed one of the university's acknowledged theories of Distance Education called the "Theory of Industrialisation" Submitted that Distance Education is a form of didactic conversation made up of postulates including well developed self-instructional resources, trained facilitators, promotion of intellectual pleasure, unambiguous language and friendly environment.

Methodology of the Study

The researcher used descriptive survey to examine the institutions involved in Open and Distance Learning in Nigeria. Furthermore, descriptive survey was used to trace historical antecedent of Open and Distance Learning in Nigeria.

The Study of Distance Education

> It is the development of distance education as an
> academic discipline that will have the most
> profound effect on its practice in the future.
>
> Eric Gough, 1984

The generation from 1970 to 2000 in Nigeria witnessed a rapid development of the whole field of distance education that paralleled the success and achievements of the Open University. There has been a remarkable change in the quality, the quantity, the status and the influence of distance education provision. This change was linked to a world-wide shift from private to public provision. From 1870to 1970, most of the systems were proprietary and the field was known as 'correspondence study' or 'home study' or 'external studies' (Keegan,1996).

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The first practical work in the area of distance education in Nigeria was carried out in the 1920s. Mr. Ogunlesi was the first indigenous Nigerian that got involved in the work of Open and Distance Education in the country beginning from the 1940s. By the close of the 1960s, many correspondence colleges had sprung up in Nigeria, which have helped many young people to pass secondary school level examinations for the purpose of gaining access into higher institutions (Omolewa, 2008).

The Open and Distance Learning (ODL) programme has been considered as one of the most important educational innovations in Nigeria. Open and Distance Learning has provided opportunities for those who could not afford to leave their job to attend to fulltime conventional education. UNESCO (2002) stated that in effort to meet the new and challenging demands for education and training, open and distance learning may be seen as an approach that is at least complementary and under certain circumstances an appropriate substitute for the face-to-face methods that still dominate most educational systems. Open and distance learning has offered access to many people who would have previously been denied access to educational opportunities based on where they live and work, poor-economic circumstances, social status, among other reasons.Open and distance learning remains the primary mechanism for the information-driven age, a tool that has bridged the gap between developed and developing communities across the world.

The provision of quality education to millions has been one of the challenges facing developing countries such as Nigeria (Jimoh, 2013). Experiences locally and globally have shown tremendously that conventional or formal education is enormously hard-pressed to meet the demands of the 21st century socio-educational milieu, especially for developing countries like Nigeria. As noted in a keynote address made in 2007 to the 3rd convocation of Covenant University (Okebukola, as cited in Jimoh, 2013) made some suggestions towards the way forward in solving the problem of over-population in universities as follows:

1. Re-introduction of the Higher School Certificate (H.S.C).
2. Qualified Polytechnics and Colleges of Education be given degree-awarding status.
3. The National Open University of Nigeria should be strengthened to take in more prospective undergraduates.

The federal government of Nigeria, early this year 2015, upgraded about three Colleges of Education to degree-awarding status and also naming them Universities of Education. However, open and distance education has, historically, been advanced as both a major means of up-grading the quality of education and succour for those who missed access to conventional schools. The revised National policy on education (2014) listed the goals of distance education as follows:

- Provide access to quality education and equity in education opportunities for those who otherwise would have been denied;

- Meet special needs of employers by mounting special certificate courses for their employees at their work place.

- Encourage internationalisation especially of the tertiary education curricula.
- Ameliorate the effect of internal and external brain-drain in the tertiary institutions by utilizing Nigerian experts as teachers regardless of their locations or places of work.

The Concept of Open and Distance Learning

Open and Distance Learning can be defined in different ways:As in any developing economy, the sub-Saharan African countries think of education for all as a major impetus behind fundamental change or transformation. In 2000, following the Millennium Summit of the United Nations – the Millennium Development Goals (MDGs) were launched. The Sustainable Development Goals (SGDs) were adopted at the United Nations Sustainable Development Summit on 25 September 2015, to finish the job of the MDGs. This may explain the three key emphases of the Millennium Development Goals (MDGs):

1. Eradication of extreme poverty and hunger.
2. Achievement of universal primary education
3. Promotion of gender equality and women empowerment.

The term Open and Distance Learning reflects both the fact that all or most of the teaching is conducted by someone removed in time and space from the learners, and that the mission aims to include greater dimension of openness and flexibility, whether in terms of access, curriculum or other elements of structure (UNESCO, 2002).

There are several approaches to defining the term Open and Distance Learning. Adebayo (2007, as cited in Jimoh, 2013), defined Open and Distance Learning as the type of education that takes place outside the conventional school system, it is imparted without necessarily having personal interaction with students or learners.

Creed (2001), defined distance learning as an education process in which a significant proportion of the teaching is conducted by someone far removed in space and/or time from the learners.

There is extensive overlap between the use of the term open education and distance education. Open learning is an imprecise phrase to which a range or meanings can be. But as an inscription to be carried in processing on a banner, gathering adherents and enthusiasms, it has great potential. For its very imprecision enables it to accommodate many different ideas and aims.

> Distance education is all arrangements for providing instruction through print or electronic communication media to person engaged in planned learning in a place or time different from that of the instructor or instructor (Moore, 1990, as cited in Keegan, 1996, p. 43).

According to UNESCO (2002), Open and Distance Learning is one of the most rapidly growing fields or education, and its potential impact on all education delivery systems has been greatly accentuated through the development of Internet-based information technologies and in particular the World Wide Web presenting approaches that focus on opening access to education and training provision, freeing learners from the constraints of time and place and offering flexible learning opportunities to individuals and groups of learners. The Federal Ministry of Education defines Open and Distance Learning as any form of learning in which the provider enables individual learners to exercise choices over anyone or more of a number of aspects of learning and distance learning as an educational process in which a significant proportion of the teaching is conducted by someone removed in space/or in time from the learner.

> "It is natural for man to desire to know, Aristotle (323BC)" (as cited in Keegan, 1996, p. 33).

The 'open' nature of education that is mediated by electronic or printed technologies might be formally institutionalised in such policies as open end admissions, freedom of selection with regard to what, when and where to learn. This approach involves helping learners take responsibility of aspects such as what they learn, how they learn, where they learn, how quickly they learn, who to turn to for help and whether, when and where to have the learning assessed.

Open and Distance Learning (ODL) has been defined in different ways and at different points in time; According to the commonwealth of Learning (COL), ODL is a learner's-oriented system that allows greater flexibility in learning while students continue with their regular work. In the words of the former Vice-Chancellor, National Open University of Nigeria, Jegede (2009), ODL provides education for all, promotes lifelong learning and improves on the economies of scale in education management. These definitions have three things in common; flexibility, cost-effectiveness and learner-centred. Open and Distance Learning can be defined as flexible, cost-effective and learners-centred educational system.

The Exposition of Open and Distance Learning in Nigeria

In Nigeria as well as in other countries education is perceived as a tool for socio-economic and political developments and as such it is accorded the necessary attention. This position on education is simplified in the Nigerian National Policy on Education, which stated that education is an instrument 'par excellence' for effecting national development (Federal Government of Nigeria, 2004). The perception of education as a tool for development by the Nigerian government dates back to 1959. As a prelude towards independence the Federal Ministry of Education set up the Ashby commission to examine the needs of Nigeria in the area of post-secondary school certification in higher education from 1960 – 1980. Part of the recommendations of the report of this commission submitted in 1960 was the establishment of the University of Lagos considering the concentration of people and the higher demand for university education. It included as one of the features that "associated with the University (but preferably under a Dean or Director with special knowledge of correspondence education) there should be a department of correspondence courses". Ashby believed that such institutions in Nigeria will be very popular and would encourage large numbers of men and women in employment to improve their education and fit them for more responsible posts. Therefore, the official recognition of correspondence education at the University of Lagos marked the beginning of an attempt to make distance education an integral part of the Nigerian University system.

This event was the first conscious attempt made to establish distance education unit as part of a university in this country. This was in line with one of the objectives of the University of Lagosfrominception that is provision of facilities for part-time studies in areas such as business administration, law and education through correspondence and distance learning techniques. Correspondence and Open Studies Institutes (COSIT). COSIT has since undergone a lot of restructuring to ensure that the frequency of study centre meetings are reduced to barest minimum, leaving only meetings for tutorials, informal group studies while the institute provides the support learning materials, such as course texts, audio and video cassettes. COSIT has since been changed to Distance Learning Institute with an enhanced status of a College that has its own academic board management and it is empowered to formulate policies, employ its staff and be responsible for academic programme, examinations as well as supervise its day-to-day activities. Some other universities in Nigeria including University of Ibadan, Ahmadu Bello University, University of Nigeria, Nsukka were providing extension course to farmers so as to acquire new skills in order to introduce them to new farming methods. The Ahmadu Bello University's Institute of Education also introduced the Teacher In-service education programme to raise the quality and quantity of teachers in northern Nigeria. later when National Council of Education ruled that the National certificate of Education (NCE) should be the minimum qualification of teaching at primary level, Ahmadu Bello University's Institute of Education, started the NCE by correspondence programme. When in 1976, the Universal Primary Education was introduced to provide equal access to educational opportunities for all citizens at all levels of education both inside formal and outside the formal school system; one of the challenge was that of inadequate teaching personnel to cope with the demand of the programme. Distance education was considered the best means of supplying the required number of teachers. This led to the establishment of the National Teachers Institute (NTI) as the first institute specially established by the Federal Government of Nigeria to provide distance education courses to upgrade under-qualified and unqualified teachers. In line with the minimum qualification directive for teaching in primary schools, the NTI also introduced the NCE by distance learning in 1990.

An attempt was made to establish an Open University in Abuja; it was truncated and was replaced with a dual-mode institution established as the University of Abuja. Within University of Abuja the Centre for Distance Learning and Continuing Education (CDLCE) was established and mandated to provide distance education component of every course that the University would provide.

However, the strong commitment of the Federal Government to distance education finally led to the emergence of the National Open University of Nigeria (NOUN) in 2002. The establishment of the National Open University of Nigeria is traceable to the National Policy on Education by the Federal Government which has as its major objective, "to make life-long education the basis for the nation's educational policies, that at any stage of the educational process after primary education, an individual will be able to choose between continuing his full-time studies, combining work with study or embarking on full time employment without excluding the prospect studies later"(Educomm Asia, 2004, p. 2).

Current Status of Distance Education in Nigeria

The high demand for education and the inability of existing institutions to meet such demand encouraged most universities in Nigeria to start new distance learning programmes initially at satellite campuses, study centres and outreach centres around the country. But the National University Commission (NUC) proscribedit. The mode of operation is to recruit tutors from the locality where the distance education centre is located, in order to organise face-to-face contacts with students. These centres replicate academic programmes in parent universities. These outreach centres cannot be regarded as distance education when viewed from international perspective. It was observed that the primary motive behind their establishment is often to generate income. The poor quality of education offered through these outreach centres was considered generally low and uncoordinated. Thus, the Federal Government decided in 2001 to limit the activities of these centres within 200 kilometres radius of the parent university. In addition, such centres must not be cited in a town or city where another Federal or state university exists.

However, the increasing importance of distance education must have informed the position of the federal government on distance education as articulated in the National Policy on Education. As at the end of 2012, the National Universities Commission has approved the following Universities as dual mode institutions; they are; University of Ibadan Distance Learning Centre, University of Lagos Distance Learning Institute, University of Abuja Centre for Distance Learning, Obafemi Awolowo University Centre for Distance Learning, University of Maiduguri Centre for Distance Learning, Federal University of Technology, Yola. The dual mode institutions combine both conventional and distance education programmes.

The National Open University of Nigeria and Sandwich programmes were offered by Universities and other institutions. The Sandwich programmes were established in the mid-80s and run by some Nigerian Universities and College of Education. The Sandwich programmes were originally designed to run during the school long vacations to create opportunities for participation by workers, especially teachers. These programmes are open to all categories of learners with varied entry qualifications ranging from primary school certificate, attempted school certificate, school certificate holders, TC II teachers, NCE and first degree holders. More women enrolled in this programme. This was to create access for those who are not able to make it to the conventional schools because of time and other factors.

Although Open and Distance Learning was introduced to the university education system in Nigeria in 1983, it only became functional in 2002. It is a timely and phenomenal evolution in the history of Nigerian higher education. It provides access to young, elderly and disadvantaged groups who are interested in the acquisition of university education, anytime and anywhere.

The emergence of the system of Open and Distance Learning is an inevitable and unparalleled advancement in the history of educational development in Nigeria and internationally. Unlike the formal system of education which has its inherent limitations with regard to expansion, provision of access, the growth of Open and Distance mode of education has now made education flexible by providing increased educational opportunities to a larger population in different situations and needs. Thus, Nigeria is moving from an exclusive, closed system, mode of "privileged" access to education towards a more inclusive educational model, which supports and is reflective of UNESCO's goal of education for the 21st century.

The National Open University of Nigeria (NOUN) was first launched in 1983. However, it was suspended in 1985 by the military government. It was re-launched in 2001. NOUN now provides instruction for over 100,000 students (Hundred thousand). The re-launching of National Open University of Nigeria in 2001, was to prove that Open and Distance Learning is not only cost-effective, but also the most appropriate avenue for widening access to education. NOUN is the first full-fledged university that operates in an exclusively Open and Distance Learning.

The practice of ODL in Nigeria takes various forms, which include correspondence study education, distance learning (Sandwich programmes), Part-Time Teachers training programme (PT – TP) Open University, weekend programmes, National Teachers Institute (NTI) and e-learning. From the beginning of correspondence courses during the first half of the 19th century to the modern conception of Open and Distance Learning, students have been provided with useful knowledge, skills attitudes and abilities.
The features of Open and Distance Learning can be summaries as follows:

- Separation of learner and teacher in the time and space.
- Flexibility in the use of multimedia devices and entry requirements for increased access and equity.
- Availability of programmes to learners at their chosen locations.
- Learner-centred
- Openness with regards to access, duration, age, sex, goals and knowledge delivery technique.
- Allowances for a two-way communication between the teacher and the learners.

According to Holmberg (1995), De Wolf (1994), and Rumble (1992), Open and Distance Learning has been used to give students a second chance at education, and this opportunity seems to have been particularly the case in teacher development programmes in Nigeria.

According to Nwaocha and Iyiama (2008), the relevance of Open and Distance Learning to Nigeria education include the following:

Access

Open and Distance Learning increases people's access to education. People who would have found it impossible to attend the conventional school system benefit from Open and Distance Learning. Many stakeholders in the education sector are interested in Open and Distance Learning because it allows greater access to educational opportunities. This advance is in keeping with the stated objectives of the National Policy on Education that, 'Maximum efforts shall be made to enable those who can benefit from higher education to be given access to it. Such access may be through universities or correspondence courses or open universities or part-time, e-learning and work study programmes (Federal Government of Nigeria, 2004).

Social Enhancement

Open and Distance Learning schemes hold a number of potential benefits for various stakeholders in the education and development process. To the learners, ODL means more freedom of access as well as a wider range of opportunities for learning and qualifications, thereby improving their social status.

Economic Growth

It is often said that Open and Distance Learning is more cost-efficient than other forms of education. ODL therefore, is an avenue for institutions to improve their internally Generated Revenue (IGR). It is also an avenue for people to become learned and be better workers in any profession they are currently engaged. Students are allowed to read up to whatever level they want hence contributing to the economic growth of the nation through better performance Open and Distance Learning is often the most cost-effective means, for the government and educational policy makers, the system is a panacea for the- perennial problem of providing equitable and accessible education in an affordable and cost effective way. The government incurs little cost on the training but develops the manpower to improve the economic situation of the nation. Nigerian prisoners or inmates enjoy distance learning programmes, so as to be useful to the nation by contributing their quota to the development and economic growth of the nation during and after release.

Calvert (1986) asserts that distance education helps extend the market for education to clientele who have not been previously served. The problem of unsatisfied demand for education versus actual supply of education services contributed to the acceptance, growth and implementation of distance education programme in Nigeria.

The Challenges of Open and Distance Learning in Nigeria

In spite of the benefits of Open and Distance education, the challenges of the programme are over-whelming. ODL is facing a number of challenges ranging from:

- Decay of infrastructure
- Inadequacies of facilities, currently militating against a successfulimplementation of the ODL programme in the country.
- Poor funding. It is common knowledge that education is poorly funded in Nigeria.
- It is very expensive to get some of the software because they are not produced locally; this is a major impediment. According to Yusuf (2006), success in any educational policy is contingent on the involvement of all stakeholders and the sponsorship of funding agencies.
- Power supply: The problem of power instability in Nigeria is perennial and has been a major setback for our technological development. Most ODL students that reside in the rural areas towns and cities are faced with the problem of epileptic supply of power.
- Lack of skills in designing courseware: Institutional delivery in ODL is greatly affected by some facilitators' lack of knowledge and skills in designing and delivering course in electronic format. This scenario is a fall out of the non ICT-compliant status of the facilitators.
- Poverty and poor ICT penetration: statistics reveal that many Nigerians live in poverty. The result of this situation is that the cost of computers and other ICT resources are far beyond their reach.
- Internet connectivity: statistics has shown that there is lowlevel of internet connectivity in Nigeria. the cost of accessing internet is still very high in Nigeria. Most ODL students make use of cyber cafes where they are made to say so much on hourly basis despite the poor services and slow rate of the servers.
- Low teledensity: Access to unhindered use of ICT tools such as telephone and internet has been very low (Asogwa, 2007). The evolution of the global system of mobile (GSM) telecommunication, the use of ICT resources for educational purposes in general and Open and Distance Learning is still very low.
- Technophobia: most of the ODL learners have no computer literacy background, hence they are afraid of using one.

- School curriculum: Some of the students admitted having no information technology/computer literacy knowledge because it was not entrenched in the curriculum at their primary and secondary education level.

Conclusion and Recommendations

Conclusion

Open and Distance Education is gaining recognition both nationally and internationally as a credible alternative to traditional or conventional mode of education. It also makes education accessible and reduces cost while maintaining quality. The use of Open and Distance Learning makes for equity of educational opportunities and services. It has become fully integrated into the Nigerian higher education system. It is however observed that the potential of distance education as a means of improving access has not been explored at the Universal Basic Education level. However, despite the innumerable advantages accruing from the aims and objectives of Open and Distance Learning, achieving these can only be made possible when the problems of low teledensity, electricity, inconsistency in programme and policy implementation, poor economy, absence of trained teachers, poor postal system, bad public image, are no longer prevalent in the system.

Recommendations

The following recommendations need to be implemented in order to improve the situation within the area of Open and Distance Learning:

- There should be academic collaboration between Nigerian Federal Universities and Open and Distance Learning institutions in Nigeria.

- Provision of the enabling environment and adequate ODL facilitates for successful and effective ODL service delivery.

- Management should admit students in line with the available resources on the ground and make the criteria for admission of students to be in line with conventional institutions.

- The enthusiasm shown by government and steps taken so far can only be sustainable with the involvement of all stakeholders (government, business groups, community leaders, teachers, students, conventional institutions, UNESCO and grassroots citizens).

- Provision of adequate power supply: The government should subsidize ODL programme and improve the electricity supply to the nation.

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